ERS4 Training

Manual

1998

CREDITS AND ACKNOWLEDGMENTS

The ERS4 Video Training Modules and Manual were developed to assist EFNEP personnel at all levels of use with the implementation of ERS4. When the ERS program was initially introduced in 1993, regional workshops were held to train the state leadership. They then had to go home and duplicate the training for their unit level personnel. From this experience, there was the desire to provide states with additional resources to implement future revisions. These training modules were designed for that purpose...to assist state and unit level EFNEP personnel in learning the ERS4 system and factors to consider as the program is implemented.

The videos are divided into two sections: Unit Level and Daily Use. The manual contains guidance for the state level leadership in addition to the unit and daily use levels. Within each level presented in this manual, there are exercises to be completed in conjunction with viewing the videos. The exercise are designed to help the user to become familiar with the operations of the reporting program. By having the videos and the accompanying manual users can review a section as many times as necessary to fully understand how the program works.

The development of the videos and manual took the creative and knowledgeable work of many individuals and groups. Nancy Johnson, EFNEP Senior Computer Support Specialist, at the University of Florida should be recognized as the co- developer of these materials. Her knowledge of the ERS4 program and how computers operate coupled with her attention to detail made a major contribution to the success of this project. She also provided the fingers on the keyboard as we attempted to illustrate the various functions of the program. Wells Willis, National Program Leader, EFNEP, was a valuable member of the team as she reviewed and approved scripts and continually reminded us of the bigger picture and that every state would put its own twists on the use of ERS4. The videos were made possible through the expertise and support of Al Williamson, Coordinator - Educational Media/Communications, at the University of Florida and his team of camera operators. The production of these training videos was a real learning experience for all of us. Without Al's patience, this project would have never reached completion. Bob-Ellen Vaughan, Senior Word Processor, needs to be thanked for using her computer skills to turn the manual pieces into a finished product. Dr. Nayda I. Torres, Department Chair for Family, Youth and Community Sciences, provided the continuing encouragement and support to get us over the top. Also, I want to thank the Florida EFNEP Agents who were patient with being ignored for a six month period while we worked on this project.

Thank you for the opportunity to develop this training module, we hope you will find it useful. If it helps you to evaluate and implement ERS4, and continues to be used to train new personnel, we will have accomplished our goal.

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Associate Professor, EFNEP Coordinator
University of Florida

Training and Implementation of Evaluation/Reporting System (ERS) for Nutrition Education Programs

Since the EFNEP Evaluation/Reporting System was designed to be used with any nutrition education effort and has the potential to be used in all 50 states and territories and in the 3,000 plus county extension offices, training was an important consideration. The turnover in local extension offices can be frequent and the need for training of new personnel is ongoing. Having to send someone from the university or the state office every time to provide the training is not cost effective. The development of tutorial videos and a supporting training manual were viewed as a viable approach.

The Evaluation/Reporting System (ERS4) Training Modules

The Evaluation/Reporting System (ERS4) Training Modules were developed to facilitate the training and implementation of Version 4 of the ERS program at the state and unit/local levels. The training modules include a manual and tutorial videotapes which discuss each component of the system, give step-by-step help with using the system and its various components and provide exercises to "try-out" the system utilizing a training database. The training manual and videos are designed to help users become familiar with the options available and give details on how to use them. The state leadership in each state will determine which components they will utilize and provide guidance to their units on the segments and customization to be implemented.

The videos are designated as unit level or daily use. The unit level tapes focus on functions which more often occur at the initiation of the system and the beginning and end of each reporting year. While the daily use tapes focus on data entry functions which occur on a daily or weekly basis. The video segments include:

<u>Unit Level-Supervisors</u> discusses the usefulness of the ERS4 system for program management, and decisions which must be made about the various components of the software before implementation.

<u>Unit Level-Basic Setup</u> introduces the user to the software and walks them through the installation, security, creating DataDBs, updating tables, using ERS Tools, upgrading from ERS3.x, and set-up to start the reporting year including entering of staff and volunteers.

<u>Unit Level-Year End</u> highlights the end of the reporting year tasks, checking data to assure accuracy, and the submission of the data to the state level.

<u>Unit Level-Advanced</u> introduces the user to some of the optional enhancements of the system including the notebook feature, multiple databases, and using subgroups and filters.

Daily Use-Adult takes the user through the data entry for the required/basic adult components of the system. Starting with the "sign on," the user is taken through data entry for adult clients including demographics and food recalls to printing of feedback reports for clients, cooperators and program management.

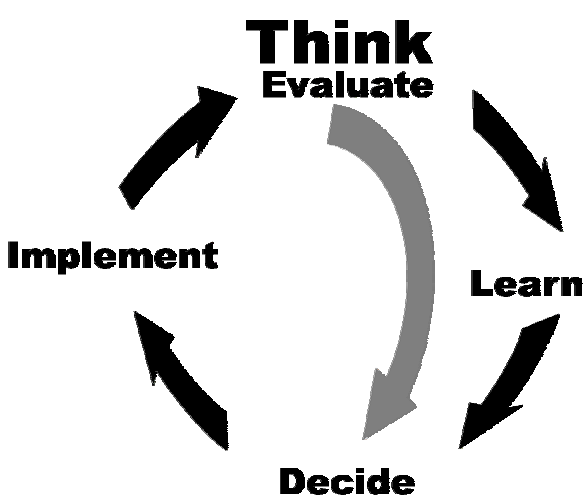
Daily Use-Youth takes the user through the data entry for the various youth components of the system. Starting with the "sign on," the user is taken through data entry of youth groups and clients including demographics and group meeting information to the printing of feedback reports for clients and cooperators.

Daily Use-Optional Components helps the user become familiar with the data entry for some of the optional features for Adult clients including the behavior checklist, the perinatal record and the foods database utilized in Nutrition Method 1.

In addition to the videos focused on unit/local level and daily use, the training manual includes a section for the state level leadership. The SRS-State Level section includes a discussion of supervisory decisions, guidance on customization, an outline of annual functions to set-up the reporting year and a checklist for the end-of-year to compile the reports from local units and submit them to the federal level. The training manual includes exercises for the following levels of users...state, unit/local, and daily use. These exercises utilize a training database to help new users to become familiar with the system without jeopardizing their real data. Sample data collection forms are also included in the manual to assist states.

Sequence

The ERS4 system has three levels...**unit/local** where the data is collected, **state** where local units are compiled and **federal** where all states are compiled to make a statement of national impact. The sequence for data collection starts at the local level, moves to the state level and is forwarded to the federal level. The sequence for implementation of the ERS4 program is in reverse order. Decisions have to be made at the federal and/or state level before ERS4 can be implemented in local units and before data entry can begin. If the decisions are not made up front, the data collected may not be useful when it is returned from the local units to the state/federal levels. All units within a state must be operating with the same set of tables and be collecting the same "default" components and optional components as directed by their states' guidelines.



Implementing the ERS4 Program

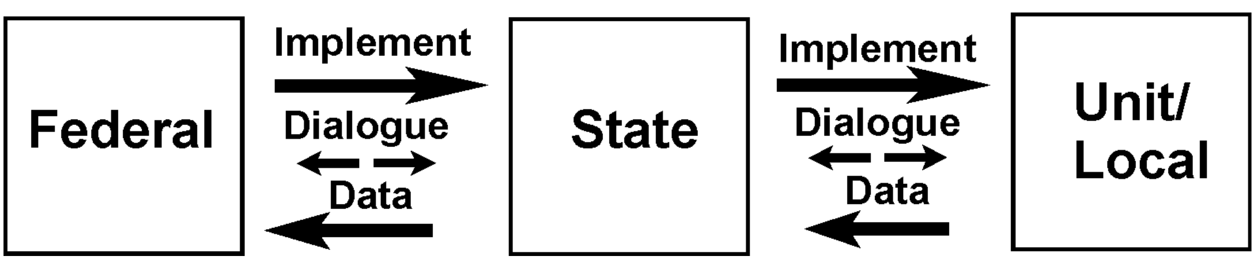
Regardless of the level of ERS4 that you are working to implement, the sequence to getting the system up and running successfully seems to be the same. The steps are:

Think: This step involves the supervisors and the users identifying and working with the issues and decisions to be made. Discussions need to include the components of the system to be used, any customization, hardware needs, possible adjustment of data-entry personnel FTE/assigned duties, data collection forms, and training needs.

Learn: In order to make sound decisions about the use of the ERS4 system, a through understanding is needed about how the software works at all levels. It is really the only way to know the impact of decisions on the people doing data collection and data entry.

Decide: Decisions about the parts of the ERS4 program that will be implemented and the components which will be customized for the state or local level are made next. Other decisions which need to be considered in this step include the adequacy of current computer hardware, data entry personnel FTE/allocation of duties, how the customization will be distributed and the data collection forms to be used.

Implement: This step focuses on the training for users and "roll-out" of the system. Setting a consistent date to used by all users is important.



Keeping ERS4 Current and Relevant

The steps to guide implementation should be repeated every reporting year to be sure that the reporting system is still relevant and meeting the needs of users at all levels.

Think-Evaluate: Are you satisfied with how the implementation is going? By evaluating what has been happening and asking questions about the usefulness of the data being collected and the success of the data collection effort, areas which might need some additional consideration can be identified.

Learn: This step may not be needed every year but only as additional components are implemented in the state/unit or as new enhancements are introduced from federal.

Decide: Make decisions about changes which are needed in the components being used, the data collection process, computer hardware, or supporting staff.

Implement: Provide training for the new features being adopted or changes being made in current operating procedures.

Implementing a Statewide Program

If the nutrition education effort has statewide leadership and the data is to be combined to make a statement regarding client impact over several units/counties, decisions will need to be made at the state level prior to introducing ERS4 to the local units. The SRS section of the training manual outlines decisions which must be considered/made at the state level. It is important to involve local units in this discussion. They will have a better feel for the feasibility of collecting the data and its usefulness at the client and staff levels. A suggested sequence for using the training materials at the state level would include:

- Review the SRS sections of the Training Manual which relate to loading the CD and Supervisory Decisions to be made.
- Become acquainted with the ERS Unit Basic and Daily Use videos,
- Do some of the ERS Unit Basic and Daily Use exercises to see the impact of decisions made at the unit level; and
- Return to the SRS sections of the manual and do the suggested exercises to customize ERS and/or Set-up for the Year.

A teaching video was not produced for the SRS State Level segment of ERS4.

Implementing a Unit/Local Program

The suggested use of the training materials at the unit or local level would be for the supervising agent to view the unit level tape with the supervisor's discussions about decisions which need to be made before implementation. To assist in these decisions, the daily use video segments can be viewed and the exercises completed. This will help to outline what the impact of the decisions will be on staff doing data collection and the impact on the data entry person. If a unit/local program has been using ERS 3.3, ERS4 does not represent a major change for the staff doing data collection and the data collection tools. It is a major change for the data entry people because it uses a Windows format instead of DOS. Adding components increases the workload for both data collection and data entry personnel.

Training will need to be planned especially for the data entry people. How the local units are organized will determine the video segments and parts of the training manual which are most appropriate for the data entry person. If this person does all the computer work for ERS4, they will need to view the "Unit Level - Basic Setup," "Unit-Level - Year End," and "Daily Use" tapes and do the exercises in the training manual. The "Daily Use" series of videos are designed specifically for the data entry person when someone else is responsible for the setup and the year end tasks. The data entry person would view a short segment on each component, generally less than ten minutes, and then go to the computer and do some specific exercises to utilize what was covered in the video. If they have difficulty with a specific area, they can review that segment of the tape as many times as necessary and review the section in the training manual. The "Daily Use" videos are divided to focus on adult or youth audiences and the basic adult components or the optional adult components which may or may not be implemented in any given state or local unit.

Summary

Technology has been utilized to design and produce a comprehensive set of training modules for the Evaluation/Reporting System (ERS4). These "user friendly" modules make this evaluation system a great resource for any nutrition education program. A companion session "Use of an Integrated Evaluation System to Measure Programs Impacts" gives an overview of the Evaluation/Reporting System, version 4 and highlights its utility as a management tool for nutrition education programs. One set of the training videos in VHS format and the manual are being distributed to each state EFNEP Coordinator. States have the option to duplicate additional copies or order copies from the University of Florida.

ERS Unit Level–Supervisors tape (34 min)

	Min:Sec
Using ERS4 for Program Management:	02:34
Reports useful in Personnel Evaluations:	
Staff Status Report (Staff Switchboard)	02:45
PP List of Families (Adults)	03:30
Group Leader Summary (Youth)	05:25
Summary Reports for a PP:	
Diet Summary for PP (Nutrition)	06:17
Behavior Checklist Summary for PP (Checklist)	07:06
Summary Reports for Entire Unit can suggest:	07:33
Staff Development - Training Needs, need for Curriculum and/or Program Delivery modification	
Sharing Impact with Stakeholders	08:10
Use Subgroups and Filters	
Summary Reports/Graphs using filters	08:28
Use Zip code filter for Legislator feedback	09:44
Adult ID Ranges	11:00
Youth Program	12:21
Organizational-Individual vs. Group Enrollment	
PPARS Indicators	15:01
Nutrition Related Issues:	18:27
Which Nutrition Method?	
Food Database Updates	22:31
Freezing and ReCalculation of Food Recalls	23:25
Checklist & Additional Question Sets	24:39
Subgroups & Filters	26:40
Perinatal Options	28:36
Sampling	31:23

ERS Unit Level Basic Setup tape (1 hr 22 min)

ERS Unit Level–Year End tape (25 min)

	Min:Sec
End of the Reporting Year Updates	
Adult	00:43
Youth	06:30
Staff	08:30
Perinatal	10:54
Interagency	11:31
ERS Year End Review of Data	12:15
Generate & Review Reports	14:30
Sampling review	17:46
Export Summary Reports to Disk for SRS4	18:35
Start a New Reporting Year	20:25

ERS Unit Level–Advanced tape (35 min)

	Min:Sec
Installation Flexibility	
What are Your Needs?	03:35
Strategies for Increasing Efficiency of Data Entry	04:58
Advanced ERS Set Up Considerations	05:34
Multiple Data Directories	07:17
Notebook Feature	09:08
Subgroups & Filters	16:25
Subgroups	17:55
Filters	18:46
Reports about Subgroups & Filters	19:26
Filters in the Training DataDB	20:02
Adding a Subgroup	21:58
Adding/Editing Filters	26:05
Manual Revise	30:40

ERS Daily Use--Adult tape (1 hr 14 min)

	<u>**Hr:Min:Sec**</u>
Main Switchboard	00:01:20
ADULTS SWITCHBOARD	00:02:14
Adult ID Ranges	00:03:07
Adults by Name, ID, and Staff	
--Explode, Jump, & Delete Buttons	00:05:00
Add a New Adult Client	00:06:18
Editing Adults	00:15:28
Key Points for the Adult Switchboard	00:18:25
Food Recalls	00:20:39
via Adults, Browse or Edit, Jump Button to Recalls	00:21:00
Adding/Editing a New Recall	00:22:12
Nutrition Method	
1 - Computerized Nutrient Analysis	00:22:40
2 - Food Group Servings	00:34:47
3 - External Nutrient Analysis	00:38:45
under the NUTRITION SWITCHBOARD	00:43:12
Key Points for Food Recalls	00:44:29
Adult Reports	00:45:53
Client Feedback Reports --Nutrition	00:47:00

Food Recall Reports for an Individual Client
via ADULTS, Browse or Edit, Jump Button to Recalls:

	Meth 1	Meth 2	Meth 3
		50:20	51:50
Participant Diagnostic Report	48:00	50:49	52:01
Food Recall Review	49:00	N/A	N/A
One Day Recall Summary	49:37	N/A	52:55

under the NUTRITION SWITCHBOARD	00:53:28
Food Recall Reports (Batch print *for Multiple Clients*)	
Program Management Reports	00:55:23
Staff Status Report	
Paraprofessional's List of Families	
Analysis of Data Reports	01:02:25
Adult Summary Report	
Diet Summary Report	
Mailing Labels	01:05:40
Key Points for Reports	01:07:00
Keyboard Tips	01:08:30

ERS Daily Use--Optional Components tape (56 min total)

	Min:Sec
For Users of Nutrition Method 1 (14 min)	00:48
NUTRITION SWITCHBOARD	
Freeze Recalls	01:35
ReCalculate Recalls	05:15
Foods Database (by ID or by Name)	06:45
Locate a food by Name	08:48
Food Dictionary	10:03
Adding Foods to Foods Database	12:00
System Configuration-Allow Update	12:27
Foods Database by Name-Add Food Item	13:19
Key Points for Nutritional Method 1 Users	15:08
Using the Behavior Checklist Survey (16 min)	16:47
CHECKLIST SWITCHBOARD	17:30
Checklists by ID, Name, Staff	
Add a Checklist Survey for a client	18:34
Indicate Additional Questions	19:18
Add Survey	20:08
Change Survey Date	23:08
Checklist Reports	
Behavior Checklist Diagnostic Report (Client)	23:40
Batch print it for Multiple Clients	24:50
Checklist Review Report (Prog. Management)	26:53
Behavior Checklist Summary Report	28:23
~~Key Points for the Checklists Switchboard~~	~~31:02~~
Using the Perinatal Record (23 min)	32:42
PERINATAL PROJECTS SWITCHBOARD	33:35
Perinatal Data by Adult ID, Name, or Staff ID	
Browse screen with PN, BF, Explode button	34:50
Explore a Perinatal Data record	35:39
Create (Add) a Record	36:56
-Prenatal, Delivery, Birth, Breastfeeding	
Perinatal Reports	
Perinatal Projects - Profile Report (Client)	46:15
Perinatal Summary Report	47:21
Perinatal Review Reports (Prog. Management)	49:43
Key Points for the Perinatal Switchboard	53:20

ERS Daily Use–Youth tape (50 min)

	Min:Sec
Open ERS program (Win95)	01:00
Main Switchboard	01:25
Volunteer Enrollment	
STAFF SWITCHBOARD	02:20
Add a Volunteer Leader	03:10
Youth Enrollment	06:54
YOUTH SWITCHBOARD	07:45
Youth Groups by Group ID, Group Name	08:07
(Browse/ then view)	
Group Enrollment type group	
Individual Enrollment type group	
Add a new Group (Individual Enrollment type)	09:20
Add a Youth (View/Edit Youth in Group)	13:27
Add a new Group (Group Enrollment type)	17:40
Edit a Youth Group	22:56
Add more Youth to an Individual Group	24:00
Youth Reports	25:32
Analysis of Data Reports	
Summary Reports -Group or Participant	26:34
Youth Delivery Mode	28:34
Program Management Reports	
Group Roster (only Indiv. groups)	29:39
Group Names by Leader	32:38
Group Leader Summary	33:55
Group Review by ID	35:12
Group List	35:55
Group Detail Report	36:35
Mailing Labels	38:05
Key Points for the Youth Switchboard	40:47
Keyboard Tips	43:56

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INTRODUCTION

The Evaluation/Reporting System (ERS) is designed to capture demographic, nutritional, perinatal, and behavioral impact data and is appropriate for use with a variety of nutrition education programs. The system provides a variety of reports that are useful for management purposes, provides diagnostic assessments of participant needs, and provides summary reports at the local, state, and federal levels. Wells Willis, the EFNEP National Program Leader, presents a brief historical prospective of ERS and introduces some of its new features on the ERS Unit Level Basic Setup video.

The EFNEP Evaluation/Reporting System has three levels of summarization and data flows sequentially from FRS (federal) to SRS (state) to ERS (local unit) and back again. The federal FRS program provides files that are used to set up the state level SRS program. Each state makes decisions about how they will use the ERS program, customizes their SRS setup, and exports files to diskette that are then sent out and used to set up the local unit level ERS program in each county. The data entered at the local unit level is the key to the ERS System. The term ERS (or ERS4) refers collectively to all three levels, or specifically to the local unit level of the program. The 4 indicates version 4 of ERS, the first version for Windows (all earlier versions were for DOS).

This Training Manual is a companion piece to a series of videos designed to introduce you to the new Windows version of the EFNEP Evaluation/Reporting System software, ERS4. The videos demonstrate the use of the unit level software, ERS. You will find that many aspects of the state level program, SRS, directly parallel those in the unit level ERS, and will be familiar once you have viewed the ERS videos. The Training Manual includes both State and Unit Level portions. The State level portion of the Training Manual is divided into Basic and Advanced SRS parts, with a combined appendix. The Basic SRS part addresses supervisory considerations, installation, and set up of the SRS program. The Advanced SRS part includes information needed for optional customization of ERS4 in your state: Additional Question Sets for the Behavior Checklist, Race subcodes, and adding foods to the federal foods database. You will want to refer to the Advanced ERS video and training manual for details on the creation of Subgroups and Filters, which can play an important role when created in SRS for state-wide use.

In the videos, we are demonstrating the ERS4 program on a Windows 95 Pentium 200 MHZ computer. The screen shots and information in the EFNEP Evaluation/Reporting System "State Level User's Guide", Volume 1, illustrate SRS on a Windows 3.1 or Windows for Workgroups 3.11 system. The appearance of screens, steps to accomplish some tasks and available utility programs vary slightly with differences in the Windows and underlying DOS operating systems.

- The manuals, on-line help system, and the ERS4 web site provide a wealth of detailed information, to help you use the ERS4 System. This Training Manual is not on the distributed CD.

ERS4 web site

http://www.reeusda.gov/ers4/home.htm

You can find current information and useful tips on using the program, ask questions, get updated files and additional documentation at the ERS4 web site.

You will find that the ERS4 program is quite flexible in the combinations of components and features you can use. It is also quite forgiving.

- The system warns if summary data being imported doesn't fit the SRS/federal reporting year.
- If you import the wrong file, you can usually recover by just importing the correct one.
- Dates are checked as they are entered in ERS and a warning is displayed if a date is outside the usual range. Warning of a possible error allows you to verify or correct the date quickly.
- As you delete something, you usually will get a warning asking you to confirm you really want to delete it.
- If you have more than one DataDB or TableDB, you need to pay attention to what combination you have Attached, because the program is flexible and will let you mix and match files from different directories.

ERS4 CD

The ERS4 program has been distributed to states on a CD-ROM which contains the software with its supporting database files, the User's Manuals and Acrobat Reader 3.01. State level personnel will need to pick Open CD and go under the \SRS subdirectory to find the SRS manuals in the \MANUAL subdirectory. The SRS installation file is under \SETUP. The programs to generate ERS and SRS installation floppy disks are both under \SRS (\SRSFLOP and \ERSFLOP). Various files that can be imported to SRS from Federal are under \OTHER.

NOTE: If you copy any files from the CD they will be marked as Read-only and you'll need to remove this file attribute to make the file usable. Installation, Import, & Restore from CD are not affected.
Win95: select file--File, Properties, uncheck box for Read Only
DOS: `attrib -r  A:\*.*` removes read-only from all files on drive A:. (*.zip, *.mdb)

Viewing the SRS4 User's Manuals with Acrobat

At the menu for the CD-ROM, you will want to install the Acrobat Reader 3.01 prior to trying to view the manuals located on the CD-ROM on your computer monitor and/or print them for future reference (pick Install Acrobat Reader). When you have finished installing Acrobat Reader, either reinsert the CD or go to the CD drive and double-click on Readme.exe to get the CD menu again. The "View ERS Manuals" button only takes you to the three unit level ERS manuals. The state level manuals are "out of sight", you need to click on the "Open CD" button which opens a window showing the directories on the CD. The user documentation for the SRS system is in three separate volumes. You can reach any of the three SRS volumes by double-clicking on the directory (folder) SRS, then Manuals, then Browse.pdf.

The Acrobat Reader Tool bar at the top of the screen includes your navigation keys:
- double left arrows take you back to the previous screen
- single left arrow takes you back one page
- single left arrow with line to the left takes you back to the beginning of this document
- single right arrow takes you ahead one page
- single right arrow with line to the right takes you to the end of the document

Other Acrobat Reader features which you might find helpful include the magnifying glass on the tool bar. Clicking it on the screen enlarges that portion of the screen. Every click makes the screen image larger. You can use one of the three page icons on the right end of the tool bar to bring the page back to 100%, to fit the page, or to make the magnified section fit the width of the page.

Contents of the ERS State Level User's Guide

Volume 1 is organized into 12 chapters to guide the operator through installation and use of the software. Clicking on Volume 1, you are at the title page. The red box in the upper left corner takes you back to the initial selection screen. Clicking on the "page # of #" box in the lower left corner gives you a "Go to Page" selection box, where you can indicate the page you want to advance to. If you type in "13" and click on "OK" button, it takes you to the Table of Contents for Volume 1.

- Chapter 1 provides a basic overview of the system and its features, and highlight differences from preceding versions.

- Chapter 2 shows how to run the system, including the suggested sequence of initial data entry for a new database. It also provides a description of the types of screens used by the system, some symbols used, some basic Windows terms, and some keyboard and mouse tips.

- Chapters 3 - 10 describe the components and functions performed by the system, including the SRS Tools application which is described in Chapter 11. Installation of the system is described in Chapter 12.

By clicking in the blue box around each chapter title, you can go directly to a section of need or interest. Use the left arrow with line and clicking in the red box to return to the three volume selection page.

Volume 2 contains samples of all the reports that may be prepared with this SRS system.
Click on Volume 2 for a table with a complete listing of the reports. Clicking on any of the report titles gives you a sample of the report, usually from the "Training" data. Clicking the red box at the top of the form takes you back to the listing of reports. These sample reports can be printed

from the File menu with "File/Print". If you are off page 1 of the document, use the "vertical line with left arrow" button to return to the beginning. Then click in the red box to return to the selection screen.

Volume 3 provides background documentation and describes the policies and procedures formulated by USDA headquarters for clarity and consistency in input and analysis. Click on Volume 3 for a table with a complete listing of all the individual documents in this volume. Clicking on any of the document titles opens the document which can be printed from the File menu with "File/Print". Click on the red box at the top of the document to return to the listing for Volume 3 and use the "vertical line with left arrow" button to return to the start document.

An example data set has been provided on the CD in the ERS4\TRAINING directory for use as a training tool. It contains a bit of all the new elements, so you can explore them and see what they are like. For a description of the contents of the data set, see the ERS Basic (Setup) Appendix 1, "Contents of the Training Data Set".

SRS Main Switchboard

Exploring the SRS Main Switchboard, Changes from SRS 3.x:
As a way of acquainting you with the various features of the SRS level of the ERS4 program and where they are located, let's highlight the features and components of each switchboard. Users of earlier versions of the Evaluation/Reporting System will find the familiar SRS components: Import, Reports, & Browse now located on the left column of switchboard buttons instead of under menus. These are used for year-end functions--importing and reviewing the summary data from local units and preparing the state level reports.

> **Import Status** controls the import of Adult, Diet, Behavior Checklist, Perinatal, Youth, Staff, and Interagency Cooperation summary data from the specified local units. It is used to view the status of imports from units in your state. The status may be viewed by Unit ID or by Unit Name, but the Import Status Report is only available in Unit ID order.
>
> **Reports** prepares the Adult, Diet, Behavior Checklist, Perinatal Projects, Youth, Staff and Interagency Cooperation summary reports from the imported Unit data. Each report may be prepared for a specific unit or for all units. The four adult summary reports (Adult, Diet, Behavior Checklist, Perinatal Projects) can be filtered to show the impact with a specific audience group. To be accessible, the filters must have been created in SRS or FRS, exported to unit level ERS and the summary data then generated and imported into SRS.
>
> **Browse** concisely describes all the summary reports that have been imported from local units. Each summary report is listed by unit ID with the filter used and number of adults on adult reports; unit ID, report period, and the date the unit prepared the export. Summary reports can be selectively deleted here by type.

The buttons in the middle and down the right side control functions which allow states to import data files from federal, customize the ERS4 system for their state use and export those files to their local units. The new components "Behavior Checklist Questions" and "Subgroups (& Filters)" are found on the middle column buttons.

Behavior Checklist Questions is used to prepare one or more additional behavior checklist question sets for use by the unit level systems in your state. The import of the federal master question file and the export of question sets to the unit level are also handled through this switchboard.

Subgroups is used to import federal subgroups and filters and to create state level Subgroups and Filters. The export file containing federal and state level subgroups and filters to be used by the your unit level systems is prepared here or under Data Interchange.

Tables maintains the state versions of the Race Code table and Foods database. Race subcodes and Food Items can be added, edited or deleted here. New with this release is the distribution of a standard list of race subcodes on the ERS4 CD. If your state chooses to collect data for a race subcode, you are asked to adopt the coding on this list, so that the federal level can combine subcodes in summary reports.

The Tables section of the SRS program is now the primary location for making changes to the Foods database. In earlier versions, only the ERS unit level of the program could be used to add or edit foods to accommodate regional dietary preferences. Merging your State-modified foods database with the new federal foods database and exporting the state-modified Race Code Table and/or Foods database is done under Data Interchange.

System Administration is used to perform system administration and housekeeping functions. The "DataDB & TableDB" button is used to manage and attach the Data and Tables files for use in SRS, similar to "File, View/Update Data Directories" in ERS 3.x. "System Configuration" is used to identify the system and specify the reporting period. The “information box” on the Main Switchboard identifies the reporting period and DataDB and TableDB currently attached.

"Security Functions" button allows an administrator with executive level permission to control User access to the system. Users who just have data-entry permission can only change their password.

All SRS Exports and Imports can be done through "Data Interchange", some can be done under the individual Switchboards, as well. **Data Interchange** is used to:

- import data from federal into SRS;
- export state-modified data for use by your local units (including Question Sets, Subgroups and Filters, Foods Database and Race Codes); and
- import summary report data from units in the state and is the place to export state summary data to the federal level system.

SRS Tools

SRS Tools is a new database maintenance program, separate from the main SRS program. Tools contains functions to Repair/Compact ("pack") databases, Backup, Restore, and Install Software Update (used for revisions to the SRS program itself). SRS Tools can be accessed through the SRS program group or from the SRS Main Switchboard. Clicking on the tools icon (ambulance on a diskette) on the Main Switchboard closes the SRS program before opening SRS Tools. SRS Tools exactly parallels the ERS Tools program in contents and use.

DECISIONS

New Features and State Level Issues to be Resolved:

If you have used an earlier version of ERS, this transition may be a good time to change the way your state uses ERS--to begin using Nutrition Method 1 or the Behavior Checklist. Although it is possible to implement all the new components at once, the transition can also be done in gradual steps. Don't rush into creating state Subgroups, Filters and Additional Questions without taking time to really think about what questions you (and your cooperating partner agencies) want answered. With some creativity and some consensus about what data your units are willing and able to collect, you'll find you can get a lot of useful information out of ERS4.

Overview of Decisions

As the state level leadership for a nutrition education program utilizing ERS4, you will need to consider the following issues and make decisions with input from local units and cooperating agencies.

Report Year Begin/End Dates *(should be a 12 month period)*
Which Nutrition Method?
Using Behavior Checklist?
Using Additional Question Sets? (*SRS must create*)
Using Perinatal? (*guidelines for use?*)
    Prenatal (*what assessment tool for knowledge/practices?*)
    Breastfeeding
Sampling? (*State must direct units on procedures*)
Youth PPARS (*what assessment tools, guidelines for use?*)

Customized files need to be distributed to ERS units, if your state decides Yes for:
Any State Subgroups? (*SRS must create, part of SUBGRP40.MDB*)
Any State Filters? (*SRS must create, part of SUBGRP40.MDB*)
Additional Question Sets? (*SRS must create, CKQSET40.MDB*)
Any Race subcodes? (*SRS must modify, RACES.DBF*)
Any State-added Foods? *(Nutrition Method 1 only, SRS modifies FOODS.DBF)*

Strategies to Make Data-entry Most Efficient

You will want to take a few minutes and think about the resources which you and the local units have to get the job done. These resources include the computer hardware and the personnel to do data-entry and how much access they have to the computer. The choices that you will make regarding the various components in ERS4 will the affect the volume of data to be entered at the unit level. If you have large numbers of clients and are doing Nutrition Method 1 and the Checklist component, you will want to explore the options to increase efficiency. The ERS4 program comes with a notebook feature and is network ready. Both of these features are viable options to increase efficiency. Additionally, consideration can be given to additional data-entry personnel, increasing the access of the data-entry person to the computer, upgrading the hardware and sampling adult recalls and checklists.

Using the Checklist and Additional Question Sets

The Behavior Checklist is OPTIONAL, but ALL of the 10 base questions must be collected, if you are using it. The impact question that arguably most impresses politicians and granting agencies is on it--(3) How often do you run out of food before the end of the month? However, there are other areas where adding a few more questions might give a better picture of the impact of EFNEP. Specific audiences or subgroups often can better reflect their food related behavior practices through a specific question set. For example, you may be working with an agency who has particular interest in food safety. You can use a question set with additional food safety questions to supplement those provided in the 10 base questions. The creation of Question Sets must be done in the state level system (SRS) and exported to the unit level system (ERS). There is no limit to the number of question sets which can be created and exported to the local units, but each client is limited to the 10 base questions and one additional question set.

You will want to carefully read through the source materials on Additional Questions in the SRS manual, Volume 3. Each question is classified as belonging to a primary area and may also have a secondary area code. You can view or print the Master Question File organized by question ID, primary or secondary area, or question text in SRS under Behavior Checklist Questions. The Behavior Checklist Summary Reports organizes questions in to three broad content areas:

FR Food Resource Management practices
NP Nutrition practices
FS Food Safety practices

The Question List Report gives a brief form of the question that would be on the client's form. The full-text of the 85 additional questions is available in the 2-questions-per-page format under the Behavior Questions Switchboard, Question Detail Report.

You will probably want to select a subset of questions, based on the focus in your state. By sharing this subset with your county faculty or partners, you can get consensus on what questions are important to your units and how many they feel are reasonable to collect. A single "Additional" Question Set is limited to a maximum of 15 questions, (that's ***in addition*** to the basic 10 that you must ask all clients).

You may create several "Additional" Question Sets to be used at the unit level with different audiences. A particular client can only have data entered for one "Additional" Question Set. Both Entry and Exit responses must be entered before the record will be included on the Checklist Summary Report. The creation of an Additional Question Set is covered in detail in the Advanced SRS part of the Training Manual, Exercise 1.

If you decide to create "Additional" Question Sets, consideration needs to be given to developing the tools to collect client responses to the items in the new question sets. The state will want to create the questions and forms so that the data collection can be as standardized as possible between units. A sample form for the 10 Base Question Set is in the ERS Manual, Volume 3.

Volume 2 of the SRS Manual includes examples of the reports available using the Checklist option.

Subgroups and Filters:

Subgroups and Filters provide the mechanism to customize adult reports to show the impact of the nutrition education with specific program efforts and clientele groups. This is one of the most useful and exciting features of the new ERS system. These reports are excellent feedback documents for cooperators and stakeholders, including legislators.

- Subgroup designations of client groups/programs are needed when the group can not be defined by the data already being collected on the adult enrollment form. A subgroup code becomes another data field value that can be used to build a filter to extract data for that particular group of clients.

- Filters extract the data for a particular group of adult clients from the general DataDB for use in reports. Filters are defined from the adult enrollment form data fields, and have specific criteria for each of the fields included. A filter may be simple (just one field/subgroup value) or complex (several different fields and/or subgroup values).

As the state level leadership, you will want to review this new component and consider how it might provide useful information showing the impact of this nutrition education program in your state with audiences of particular interest. Think about some of the partners you currently have at the state and/or local level and what could be gained by being able to give them impact data on their particular client group.

Now is a good time to start a dialog with your county faculty and partners about how subgroups/filters can be useful and get their suggestions on what subgroups have enough consensus support to be considered for state level subgroup coding. While you may have up to 10 state level subgroup codes (M-V), each client in every unit will need to be evaluated against all the state level subgroup codes you decide to use and marked with those that apply. This is in addition to the five federal level subgroup codes. Any individual adult client can be designated as being associated with up to eight subgroups. In addition, local units can identify subgroups that they would like to track at the unit level. Units can have up to 4 additional codes (W-Z), which are not exported to SRS and thus can not be summarized for the state.

Since filters use existing data, there is no limit to the number of filters which can be created. Like subgroups, only filters created at the federal and state level are exported to the state by local units and can be aggregated for state level reports. The FRS/SRS/ERS system will allow up to 26 subgroup code choices, designated as A through Z. The system allows the designation of subgroups and filters at all three levels...

Federal: The **new** installation option of both the SRS and ERS programs, includes the federal subgroups and filters defined as of 3/98. The use of the federal subgroup codes is expected if they are relevant to the nutrition education program that you are delivering. They are:

A EFNEP
B Food Stamp Nutrition Education Program
C ES/WIC

D Team Nutrition
E Sample

The federal level has defined the following filters which are also included with a **new** install:

FoodStamps	Receiving Food Stamps
PregTeens	Pregnant & Age < 20 yrs
WIC	Receiving WIC/CSFP Assistance
<ALL>	Entire Unit

and individual filters that select the federal subgroups (records must be coded)

State: When a nutrition education program has state leadership and data is to be aggregated, the state may specify subgroups and filters which will be used by all units. The state can define up to 10 subgroups using the letters of M-V, and any number of filters.

Unit: Locally, units can define up to 4 subgroups and an endless number of filters to meet their needs for data feedback to specific cooperators.

Curious as to what subgroups might show? You can see by taking an audience that doesn't fit the traditional data and assigning a subgroup code at the state level. Ask units to begin coding clients with the subgroup code immediately (by writing in the code on their current Adult Enrollment forms) and designating it on the ERS New Adult or Edit Adult screen, when available. Before units can enter the state subgroup or use its filter, you will have to export the SRS subgroups & filter file to ERS and distribute it to your units. Even a few months of data that have had the subgroup code assigned can constitute enough of a sample to show trends that validly represent the population of interest. Interesting findings can be inferred when the Adult demographics of the subgroup look very similar to the Adult demographics of the state as a whole, but there are striking differences in the Behavior Checklist Summary or the Diet Summary.

Additionally, you can apply a filter to your imported Version 3.x data in the **unit level** ERS program, and see the impact with a specific segment of the population. For example, if you wanted to see the impact of your nutrition education effort with Food Stamp recipients, you could apply the "FoodStamps" filter to the various summary reports and generate impact data for that particular segment of clients. Once all the unit level ERS4 Summary Reports containing filters have been exported from ERS and then imported into SRS, you can generate state-wide filtered summary reports. Version 3.x summary data did not have filters and can't provide SRS4 with filtered reports when imported directly into SRS.

Perinatal Projects:

The Perinatal Projects is a new optional feature of the ERS4 System. Guidelines will need to be developed at the state level to help local units know how and when to use this new feature. The Perinatal Component is in the ERS level program and can be used by local units independent of the state. Since the Perinatal Record collects additional data on clients, it is important to involved your county faculty in the discussions about how this segment of the reporting program will be organized and implemented. It will ultimately be up to the state leadership to determine where the decision to use is going to be made. If local units are left to make their own decisions, the aggregation of the data could be less than reliable. Another discussion centers around which clients will be included...all pregnant women, only pregnant or pregnant women being served by designed agencies, and/or all breast-feeding women.

There are two components which can be collected independently or together...prenatal and breastfeeding. The use of this section will be influenced by the length of commitment a unit/state is willing to make to a clientele group. Since the assessment outputs are focused on the Date of Birth (DOB) of a healthy baby, a minimum of four months may be necessary. If the program uses the breastfeeding component, there will be an additional length of time. To generate a summary report for the Prenatal portion, you must have the Date of Birth and birth outcome information, and the DOB must fall within the Reporting Period. Other required information includes the dates of the first and last CES contacts, curriculum and lesson location, and the Exit Code is not equal to 0. The Breastfeeding Summary similarly requires a DOB for all babies being followed and an End Record Date within the Reporting Period for a record to be included. The Breastfeeding Summary does give a count of how many initiated breastfeeding during the reporting year and have not yet completed it. There is a Perinatal Review Report that lists the data that has been entered for the clients being followed for Prenatal or for Breastfeeding. Clients must be entered in the Adult screen before Perinatal data can be entered.

Information tracked for prenatal clients includes number of CES and WIC contacts, curriculum used, lesson location, weight gain, knowledge and practices with tobacco, alcohol and drugs at ENTRY. The Breastfeeding component tracks initiation/duration of breastfeeding, source of breastfeeding information and introduction of formula and solid foods.

If your state chooses to use the perinatal segment, tools will have to be developed to collect the information and assess the knowledge and use of tobacco, alcohol and drugs. A sample perinatal data collection tool is included in this training manual.

Since the data for the perinatal section becomes available over several months, a strategy will need to be developed for collecting the information from the client and getting it entered into the computer. The designation of fields to be completed at various times in the pregnancy and breastfeeding segments might be helpful to the PP and the data entry person.

Using the Youth Impact Indicators:

The PPARS Impact Indicators for youth are included on the group enrollment form. At the time of enrollment, there is the opportunity to mark the indicators which will be measured for this particular youth group. At the end of the reporting year or when the group discontinues meeting, the percent who achieved the indicator is indicated. The percent who achieve the impact indicators are reflected in two youth reports and can serve as feedback for a particular cooperator, volunteer leader or as a statement of impact for the unit as a whole.

- The "Summary Report" for groups or individuals gives an indication of the percent of an identified number of youth in an identified number of groups who have achieved this indicator.

- The "Group Detail Report" provides an indication of the percent of youth who achieved each of the indicators in a specific group.

Consideration should be given to which indicators will be collected from which youth groups. Will you collect all indicators or designate specific indicators for specific ages or curricula? All indicators might not be appropriate for all age groups and all curriculums. States will want to review their youth curricula and determine which indicators are being address. Since there are no standardized tools available, states will want to identify or suggest to local units tools to use. The use of similar tools among units increases the reliability of the impact data being received.

Local units will need guidance on how the data will be collected, scored, summarized/recorded and percentages calculated. Questions and/or guidance to include for local unit:
1. who will be collecting assessments (Volunteer leader or Paraprofessional)?
2. what assessment tool for what PPARS indicator(s) and what age range
3. who will be scoring the assessments (Vol., PP, Agent or Other person)?
4. who will be determining the PPARS indicator "improved percentage" to be entered for a group?
5. should a PP or the Data-Entry person keep a central log with each group, the PPARS scores to be collected, and enter those scores when available ? (not in ERS4, could be kept on paper or in a spreadsheet)

Some form of a pre-post test question(s) would normally be used to assess improvement and the change is converted into a percentage for a particular PPARS indicator. Someone will have to collect the test data for each group, score it, and when exit data has been gathered, calculate the improved % that is to be entered on the ERS youth group screen. Units may find it helpful to keep a log indicating which youth groups should have which Indicators (perhaps in a spreadsheet form, with columns to record the PPARS percentages for each youth group), so units can check more easily to see which ones have been received and which ones are still missing. If the percentages are entered into the log, there will a record to use when trying to verify that the PPARS Indicators were entered on the computer correctly for appropriate groups.

Adult ID Ranges:

Adult ID Ranges is a new feature in the unit level which you will need to advise your unit on using. It allows the user to reserve a group of adult ID numbers for a specific staff member. This feature is optional and works well as a program management tool.

- It is helpful when adding clients using network or notebook features so that the merger of data does not present conflicts in ID numbers.

- When a staff person is assigned a particular set of numbers, it is easier to spot missing client data on the PP List of Families. If a staff member has been assigned the ID numbers from 1,000 to 1,900 and the range of 1100-1125 is missing, unit supervisors would know where to start the search.

The size of the ID range would normally be four to five times the annual caseload for adult PPs. IDS roll-over when the top is reached and the next-available ID number in the range from the low end, is assigned to a new client. The decision regarding the use of Adult ID Ranges and getting them established should be made as part of the Starting A New Year function. Otherwise, ID numbers in the range might already be in use by another PP.

Continuing Discussions and Decisions..

Which Nutrition Method to Use?

Is the nutrition method you are currently using giving the impact data desired or needed? In situations where data is to be aggregated at the unit and/or state level, the use of the same nutritional method in all units is essential. The nutrition method to be used is a decision you will make at the state level with inputs from your local units. The federal foods database is in ERS and loads as part of the ERS install at the unit level. You will need to give local units guidance on which method to use and the tools to collect the information. Review the Foods Database Documentation in the SRS Manual, Volume 3, for the most current interpretation and recommendations from FRS regarding the various parts of the nutrition component. Once you have decided on the nutrition method to be used, you will want to standardize the data collection tools for the units. Examples of data collection tools are included in the training manual which accompanies this video.

The ERS system defaults to the least detail nutrition method when multiple methods are used in the same unit and/or same state. For example, if Nutrition Method 1 is selected and one record is entered in a unit using Nutrition Method 2, the entire unit and/or state will show as using Nutrition Method 2. You will need to provide guidance to your unit leadership in the nutrition method to use.

Nutrition Method 1 utilizes the federal foods database of 1500 plus foods to analyze client diets for food group servings and nutritive value. This analysis compares the diet to the recommended food group servings and nutritive values. If you have been using Nutrition Method 1 in the past, you will want to review the changes noted in the SRS Manual, Volume 3, Revisions to Database, October 1997 and 1998. These changes need to be shared with local units to help them in adjusting to the new foods database.

When using Nutrition Method 1, time is required to code and enter the foods but the Diagnostic reports for the client can be very beneficial in knowing the shortfalls in their dietary practices. The Diagnostic report can serve as an excellent teaching tool to assist in identifying the foods which are contributing to a healthy diet and the items which are not. There are three reports available with Nutrition Method 1 which provide feedback for the client and can serve as an excellent teaching tool. The three reports are:

- The Participant Diagnostic Report
- The Food Recall Review
- One Day Recall Summary

Examples of these three reports can be found in the ERS Manuals, Volume 2.

Nutrition Method 1 has the added advantage that the difficult decisions about how to calculate food group servings for mixed dishes, such as pizza and hamburgers have already been done, and will be the same each time that food is reported.

Nutrition Method 2 depends on many individuals making objective decisions regarding the food group serving value of the foods consumed by the adult client. Feedback to the client is limited to the number of food group servings consumed as compared the recommendations in the Food Guide Pyramid. Since the foods are not entered, food sources are not associated with the food groups and there is not indication of the nutritive value of the diet..

Nutrition Method 3 requires that foods be entered into another nutrient analysis program and the results of that analysis be typed into the ERS system. There is a lot of room for error in data entry and no easy way to error check. This is a very time consuming way to do the nutrient analysis. Additionally, since the foods are not entered into this system, the feedback reports for the client are limited. The food sources are not associated with the food groups and nutrients they provide.

Nutrition Method 1 Users:

Food Database Updates:

If your state is using Nutrition Method 1, you will have a decision to make regarding using the new foods database from federal alone or retaining your previously added state foods. It is recommended that updates be made to the foods database only at the state level. There is a need for consistency in the foods database used in a state where the data is going to be aggregated. Local units can have the opportunity to submit foods for inclusion in the foods database. By handling all the additions in one place, the analysis of the foods can be handed in a consistent manner. Additionally, it is important to keep track of the foods being added and that the food ID be consistent across all units. To avoid conflicts with future additions from the federal level it is important for states to use the ID number of 90,000 as the start number when adding new foods.

Merging with the federal foods database and adding new food items are addressed in the Advanced SRS part of the training manual.

Checking for the Latest Foods Database:

The federal foods database which loaded with the CD New Install includes 1523 items with Food IDs through **1540 BEEF, PASTRAMI**. There have been changes since the 10/97 version released with ERS 3.3. Search for Food ID 503, if you see that **504 EGG, WHITE ONLY, RAW** is still there, you do not have the 2/98 federal foods installed. Volume 3 of the SRS Manual identifies all the changes which have been made in the federal foods database in 10/97 and 2/98. You will want to be sure that these lists of changes are noted by the individuals coding foods and doing data entry. You will need to print new a new Food Dictionary for the use of people who are coding food and doing data entry.

Freezing and ReCalculation of Food Recalls:

Freezing food recalls is a way to recover some hard disk space for units using Nutrition Method 1 and with large enrollments. Freezing the food recalls retains the analysis of the recall but removes the actual food list and prevents future changes to the meal items. It is generally recommended that recalls not be frozen until the client has completed the program and only then if disk space is a problem. Freezing recalls does not impact the ability to print reports for the unit. It does impact the ability to print the Diagnostic Reports for the individual client. As the state leadership, you will want to advise your local units on freezing food recalls.

ReCalculation of food recalls only applies to Nutrition Method 1 users. It is generally done when a new foods database is imported into the system. The ReCalculation applies the new foods database to the unfrozen recalls. You will need to advise your local units on when to do this step ...at the time they receive a new database or at the beginning of a new reporting year.

Sampling:

Sampling applies only to Food Recalls and Checklists and is designed to give workload/data entry relief for the Paraprofessionals who code Nutrition Method 1 food recalls and the people who enter the data into the ERS computer program. Adult Enrollment form data must still be entered for all enrolled EFNEP clients. The new federal code "E" for Sample is used by states that have submitted a Sampling plan to the federal EFNEP office, which has been approved. A sample filter is used to generate the Adult Summary report for the members of the sample which is compared to the Adult Summary for all EFNEP clients. If the two summary reports generally agree, the sample is a good representation of the state EFNEP population and the Diet Summary and Behavior Checklist Summary may be accepted valid for the state. If there are wide discrepancies, the sample was poorly chosen and may need to be re-drawn and reports re-generated to get data that can be accepted as valid.

When sampling is used, the Diagnostic Report is not available for every client. If providing feedback to specific cooperating agencies is an important part of your program management plan, sampling will offer some special challenges. The sample for those agency clients will need to be monitored carefully to be sure that they are truly representative of that population and/or are truly represented in the sample for the entire population.

Sampling plans for the EFNEP program must be presented to the National Program Leader for EFNEP and approved prior to their use. Other nutrition education efforts will need to seek the advice of their state/federal leadership.

Race Codes and Subcodes:

Does your state stay with the basic five or do you decide to collect data for some of the larger subcodes in your state? The filter feature of ERS4 makes it possible to print all of the adult summary reports for the various racial subcodes which might be powerful information for some stakeholders. A list of 31 race codes and subcodes have been included in this training manual and on the WEB site. If your state collects data for race subcodes, you are asked to standardize using this list. If your state uses race subcodes, it is imperative that all units import the subcodes and use them. Otherwise, the State summary report totals for all units will be off in the corresponding reports and the data will be distorted.

Using ERS4 for Program Management:

Program Evaluations:

The Adult Summary, Diet Summary and Behavior Checklist Summary reports are excellent for comparing the status of local units to the state as a whole. These reports can assist in identifying programs where caseload, clients being targeted and impact with clients is not following the state guidelines or creating the desired results. This information can assist you in identifying areas where additional training is needed and areas where the curriculum or program delivery may not be working.

In the youth component, the Youth Summary and the Youth Delivery Mode reports are excellent for comparing local units to the state averages to see if outreach to youth and adults is within the recommended guidelines and if youth programs are having an impact with clients. This information can assist in identifying areas where additional training is needed and where the curriculum or program delivery may need addition.

Sharing Impact with Stakeholders:

The Subgroups/Filters feature lets you customize the adult reports to give a cooperating agency information on their particular client group and the changes that they have made as a result of the nutrition education intervention. Additionally, the zip code feature lets you customize reports for a specific legislative district and share how clients in that district are benefitting from the nutrition education intervention.

IMPLEMENTING ERS IN YOUR STATE

Now that you have a feel for the switchboard format and what the various switchboards control we are ready to focus on how to use the new ERS4 software. The series of videos is designed to introduce you to the new Windows version of the EFNEP Evaluation/Reporting System software. The focus is on how to use the unit level software. Reviewing these videos will complete your orientation to the ERS4 System. We are going to look at the infrequent steps to get the state level system, SRS, set up. The set up of ERS4 for unit level use is discussed on the Unit Level Basic Set Up video.

Implementing SRS/ERS will involve:
1. Install SRS
2. Install/Import any federal Updates to SRS
3. Watch *Basic ERS training tape* and Install ERS at your state office
4. Install/Import any federal Updates to ERS
5. Do unit level ERS exercises to create training data exports for SRS use, then SRS exercise to import them into SRS, and then play with the example data.

The *ERS Supervisor training tape* explores decisions that can be made at the unit level.
The *Advanced ERS training tape* with the Advanced SRS and ERS parts of the training manual show how to customize aspects of ERS4 for your state. More complex ERS installation situations involving multiple computers or the Notebook Feature are explored on the *Advanced ERS training tape*. The 3 *Daily Use tapes (Adult, Youth, & Optional Components)*, show how to add, edit, or delete data in the ERS program, and how to produce reports. You are encouraged to watch all of the training tapes before deciding what you want to customize in your state.

6. Set up your real data directory, System Configuration
7. If any State Customizations are to be done,
   a) Create/Edit State Customizations
   b) Prepare Customized Diskettes and Instructions for unit level--might do separate import files or an "All in One" diskette for initial ERS setup
8. Prepare any federal Updates to ERS for unit level (ERS4 program updates, or individual import files).
9. Distribute CD/diskettes, forms , and specific instructions about the set up and use of ERS in your state to your units.
   a) ERS4 CD or Installation diskettes
   b) federal Update diskettes (if any)
   c) State Customization diskettes (if any)

SRS4 Installation Considerations

On First-time SRS4 Installation, Everyone picks "New"

If you are upgrading from ERS 3.x, you will have the opportunity to do state customizations of your foods database and race codes later. A **New** installation of SRS4 will install the 3/98 CD version of the federal files which can be identified as follows:

Master file of Additional Behavior Checklist Questions...85 questions.

Subgroups A-E currently defined in FRS, the federal level of the program

A EFNEP
B Food Stamp Nutrition Education Program
C ES/WIC
D Team Nutrition
E Sample

Filters FRS default filters include:

FoodStamps Receiving Food Stamps
PregTeens Pregnant & Age < 20 yrs
WIC Receiving WIC/CSFP Assistance
<ALL> Entire Unit
and individual filters that select the federal subgroups (records must be coded)

If the State has defined any subgroups and filters, all units must incorporate them into ERS and code the appropriate subgroups, or the SRS Adult Summary report data will be distorted. Filters can be corrected at the end of the report year by importing the correct file and re-exporting the Adult summary report. Subgroups must be coded throughout the year on the individual Adult records and are not easy to fix at year-end.

Race codes and subcodes The 5 main race codes are required and are installed in both SRS and ERS. If your state collects data for race subcodes, you are asked to standardize on the set of 31 Race codes & subcodes listed in Appendix 1 "Race Code Table with Federal Subcodes 3/98".

If a Race subcode was not imported by an ERS unit, their clients will not be shown as members of the subcode on their Adult, Youth, and Staff summary reports and the State summary report totals for all units will be off in the corresponding reports. This can distort your data and it is not easy to correct because when a race subcode was not available, the main race code would have been entered on each individual Adult, Youth, or Staff record.

Foods database The federal foods database includes 1523 items with Food IDs through **1540 BEEF, PASTRAMI**. There have been changes since the 10/97 version released with ERS 3.3. Under Tables, Foods by ID, Locate Food

ID 503, press ESC and if you see that **504 EGG, WHITE ONLY, RAW** is still there, you do not have the 2/98 federal foods database installed.

All units must be using the same version of the foods database if they are being combined with the SRS program into a Nutrition Method 1 Diet Summary report. Changes to the foods database should now be made in SRS, and distributed to all ERS units. The only exceptions might be a "stand-alone" unit where there is no aggregation in SRS, or a unit using Nutrition Method 1 where the State only requires Nutrition Method 2 (Food Group Servings).

If you are Reinstalling SRS4, read about the consequences of "New" vs. "Use Existing DataDB/TableDB" installation choices in Appendix 2 "Reinstalling SRS4?" before proceeding.

Exercise 1. Install SRS

1. Insert ERS4 CD (contains SRS installation files & manuals)
2. Windows 95 users will usually get a menu automatically. If no menu was displayed,
   a) Windows 3.x users will need to go to File Manager
      Win 95 users go to My Computer or Explorer
   b) double-click on the CD-ROM drive letter
   c) then double-click the file **Readme.exe** in the root directory
3. Click "View the Readme file" button and then File, Print and get a printed copy of the file.
4. Click "Open CD" button to see contents of the CD, then click on the SRS directory.
5. Browse the files under the SRS directory for a file called SETUP.EXE and double click it to start the install.
6. Accept prompted path for installation C:\SRS4
7. **For a First-time Installation**, pick **New** and follow instructions on screen. It installs the 3/98 CD versions of the federal Foods database, the federal pool of Additional Behavior Checklist Questions, federal-defined Subgroups & Filters, and the 5 main Race codes. Note that the Poverty Level table, RDA table, and Minimum Servings table are not in SRS, they must be modified in the unit level ERS program.

   If you are Reinstalling SRS, you may want to pick the "**Use Existing DataDB & TableDB**" installation option, instead. Before deciding, evaluate the consequences of these two installation choices in Appendix 2 "Reinstalling SRS4?"

Open the SRS4 Program

1. Open the SRS program by double clicking the:
   Shortcut to SRS icon, then the SRS icon (Windows 95) or
   SRS icon located in the SRS Program Group (Windows 3.x)
2. Logon with Name ERS, Password ERS (use all uppercase, it's case-sensitive)

SRS Program and Data Files

SRS4 AppDB
AppDB = Application file SRSAPP40.MDB, contains the SRS program code, screens, & reports

SRS4 DataDB
The SRS DataDB contains the Master Question file, Additional Questions Sets, Subgroups & Filters, as well as the Summary Reports for Youth, Staff, Interagency, and the Adult components = Adult, Recall, Checklist, & Perinatal Summaries.

SRS4 TableDB
The Race Code Table & the Foods database are part of the SRS TableDB.

Other Important Files:
SYSTEM.MDA contains usernames, passwords and related information, located in the main program directory (SRS4 or ERS4) and in each data directory.
MSARN200.EXE runtime MS Access 2.0 program, located in the Windows\System directory
ERS.INI has the locations of the ERS DataDBs & TableDBs, located in main program directory
SRS.INI has the locations of the SRS DataDBs & TableDBs, located in main program directory
LDB files--record locking information, one associated with each .MDB database file.

Where are you?

Look at the information in the box at the top of the SRS Main Switchboard screen. It tells you the name of the attached DataDB and TableDB and what directories on your hard disk are associated with the those names. It's very important to notice what data directory you are in when working in SRS. By default, the installation program creates and attaches C:\SRS4\DATA.
Each SRS data directory is treated completely separately, the files imported from federal FRS and the state creations and modifications within the current directory affect the contents of:

Master Question File and any Additional Question Sets you have created there
Subgroups & Filters you have created there
Foods database modifications
Race code modifications

A **New SRS** install and a **New ERS** install from the ERS4 CD will start everyone in the same place. **If federal has issued any updates, you will want to install or import them before doing any state customization,** because the files you customize may have been changed in the update. You can then begin to customize first SRS, and then ERS for your state.

Federal Files

Individual Federal files may need to be imported to SRS after a Reinstall for State Customization of Races or Foods, or if the Federal office has released Updates. This is more likely if V 3.x Tables had been used and you picked the "**Use Existing DataDB & TableDB**" installation option on the reinstall. Check the ERS4 web site for a newer version, before using CD files.

You can import any of these files through Data Interchange. Those current as of 3/98 are on the ERS4 CD in the \OTHER directory:

a) Import Master Question file (Additional Q's) from FRS (\CKQMAS\ckqmas40.mdb)
b) Import Subgroups & Filters from FRS (\SUBGRP\subgrp40.mdb)
c) Import Foods Database from FRS (\FOODS\foods.dbf)

d) Import Race Codes (\RACE5\races.dbf = just basic 5 race codes)
(\RACESUBS\races.dbf = 31 race codes & subcodes)

Install/Import Updates before Customizing SRS/ERS

When updates from federal are released, they will be found on the ERS4 web site:

http://www.reeusda.gov/ers4/home.htm

Check the web site when you install SRS and before you do your ERS4 distribution to units to make sure you have the latest files and information.

Download necessary files and read instructions on how to Install/Import the Update.

Table, Subgroup & Filters, or Additional Question files will usually unzip into individual update files which you would import into SRS through Data Interchange, customize for your state (if needed), and then export and distribute for ERS use. SRS is capable of importing the Race Codes Table, Foods database, Subgroups & Filters file, and the Checklist Master Question File.

If updates are released for the SRS or ERS program files, they will need to be applied through the SRS or ERS Tools, Install Software Update button.

Is Customization Needed?

State Customizations are optional and are explored on the *Advanced ERS tape* and manual (for subgroups & filters) and in the Advanced SRS part of this training manual. The ten base questions of the Checklist and the Perinatal component do not need any special setup, they are available with the installation of ERS4. At the Start of the Report Year, the state office will need to prepare and distribute customization files on diskettes to units with instructions on how to set up and use them in ERS, if the supervisor answers any of the following with Yes:

1. Any Additional Checklist Question Set(s) to be created and used state-wide?
2. Any Subgroups to be created and used state-wide?
3. Any Filters to be created and used state-wide?
4. Which Nutritional Method?

If Nutrition Method 1,
Any state-added foods that must be merged with the new federal foods?
If no, do you have state foods to add in SRS now?
5. Any Race subcodes to be used state-wide?

State Customization Issues

As you watch the rest of the training videos and see how the Training data looks in different options and components at the ERS level, the decisions the state-level supervisor must make about how to customize SRS and ERS for use in your state will become more understandable. Throughout the ERS videos, there are a number of instances where different choices can be made and we have said "your state office will advise you". It is important that you as the state-level person making the decisions about how to implement ERS4 in your state, take the time to explore all of the options presented on all of the ERS4 Training videotapes.

We recommend that you go through the Unit Level Basic Setup tape and exercises with the Unit level Training data before returning to finish this SRS tape. In order to have SRS data to play with, you will need the Summary Report diskettes created from the 3 ERS Training data directories, using different Unit IDs and Unit Names.

You need to become very familiar with the workings of the Unit level program before you can make the decisions about how to implement this program for your state. The Advanced ERS and the 3 ERS Daily Use tapes can provide you with the background to understand the impacts at the unit level of various choices you need to make. The ERS Supervisor tape addresses issues and decisions that the unit level supervisor may make.

Many of the components in SRS parallel those in ERS. Once you have completed the ERS videotapes and exercises, the look and use of the SRS Switchboard should be familiar. Only unique features of SRS will be addressed in this part of the Training Manual.

We will be creating a directory called TRAINSRS and importing the files you exported from ERS4, so you will have some data to play with. When you are done exploring and it is time to set up your REAL data directory, you will want to be sure you are in the right directory before you invest a lot of effort in customizing your data. Question Sets, in particular, can not be copied from one SRS directory to another--you have to re-create them if you want them in another location. The Subgroups & Filters, Foods.dbf, and Races.dbf can be imported to another SRS directory.

Prepare SRS4 for Practice Use

You will be doing SRS "End of the Reporting Year" Activities first to create a safe place to play and to bring some example data into SRS that you can manipulate.

Exercise 2. Create an SRS TableDB and Directory where you can "Play"

1. In SRS, go to System Administration, DataDB & TableDB, Maintain
2. use File Manager button to create a new **TRAINTBL** directory under C:\SRS4

a) locate the C:\SRS4 directory and click on it to select it
BE CAREFUL!, the default highlighted directory is often NOT SRS4
b) click on File, Create Directory, type TRAINTBL, click OK
c) double-click on the TABLES directory in the right side pane
d) on the right side pane, click on srstbl40.mdb to select it
e) on the menu, File, Copy
f) type in C:\SRS4\TRAINTBL\ then click OK
g) on the left side pane, drag down until you see TRAINTBL and double click to open it--the srstbl40.mdb file should appear there now
h) click on File, Exit

3. then Add TableDB, name the "New DB Name" TRAINTBL to match your subdirectory name
4. Click on Next
5. Click on Browse, locate the TRAINTBL subdirectory under C:\SRS4\ and double click to select it, then click OK
6. Click on Save

Exercise 3. Create an SRS DataDB and Directory for Imports of Training Data

(ERS units using the Training data set must be imported to a SRS4 directory with the FL Unit ID and Reporting Period to import and generate reports correctly)

1. (In SRS, go to System Administration, DataDB/TableDB, Maintain)

--you are already in Maintain DataDB and TableDB after creating TRAINTBL above--

2. use File Manager button to create a new **TRAINSRS** directory under C:\SRS4
   a) locate the C:\SRS4 directory and click on it to select it
   BE CAREFUL!, the default highlighted directory is often NOT SRS4
   b) click on File, Create Directory, type TRAINSRS, click OK
   c) click on File, Exit
3. then Add DataDB, name the "New DB Name" TRAINSRS to match your subdirectory name
4. Click on Next
5. Click on Browse, locate the TRAINSRS subdirectory under C:\SRS4\ and double click to select it, then click OK
6. Click on Save
7. Press ESC or click on the Exit button to go to the "Attach DataDB and TableDB" screen
8. Click on the new TRAINSRS name in the "Available DataDBs" list
9. Click on Attach
10. The New DataDB/TableDB warning appears saying
    "The DataDB or Table DB identified above does not exist or cannot be accessed"
    "Click CREATE to create it (This is usually what you want to do)"
11. Click on Create because we are trying to create it (it's not real until it successfully attaches)

Upon successfully attaching the TRAINSRS and TRAINTBL databases, SRS takes you to the SRS Main Switchboard, where you should look in the information box and confirm that you created it in the right place and successfully attached the DataDB you meant to get. If you got an error message when Attaching, ERS4 substitutes a different DataDB.

Exercise 4. Import Summary Data exported from ERS4

1. Go to Import Status, pick Import Summary Data, and try importing the file exported from the first of the 3 ERS4 directories, C:\ERS4\TRAINING. You will get a yellow box with the message "End period is not within current reporting period. Cannot import".

The reporting year dates that were current at the time a DataDB was created are automatically assigned to the new DataDB. Because the training data was collected for 9/1/96 - 8/31/97, we will need to change the SRS TRAINSRS DataDB reporting year dates.

2. To change settings for the Attached TRAINSRS DataDB, Go to System Administration, System Configuration.

   The default DATA directory in both new ERS and SRS installations prompts as:
   Unit ID XX000
   Period Begin 01-Oct-1997
   Period End 30-Sep-1998

3. Type in the following entries, then Save.
   Unit ID FL012
   Unit Name SRS Training data - Play Only
   Period Begin 9/1/96 (7/01/96 on CD, changed in unit Exercise 7 & 7a)
   Period End 8/31/97 (9/30/97 on CD)

*4. Under Import Status, pick Import Summary Data, and import the file exported from each of the 3 ERS4 directories C:\ERS4\TRAINING, TRAIN 1 & TRAIN2. The filename is EXPSUM40.MDB, you will probably have 3 separate diskettes, each with this file on it.
   C:\ERS4\TRAINING FL999 Example Database
   C:\ERS4\TRAIN1 FL000 TRAINING 1
   C:\ERS4\TRAIN2 FL888 TRAINING 2

* source diskettes created in unit level Exercises 9 & 9a on the Basic ERS tape

Now PLAY with your example SRS data, try things out. It's safe to make mistakes in the C:\SRS4\TRAINSRS and C:\SRS4\TRAINTBL data set. You can start over by importing the individual federal files from the ERS4 CD \OTHER directory (or web site, if updated). Re-importing ERS-exported Summary Reports replaces any versions of those reports previously imported into the current SRS DataDB.

The state level subgroups and filters and Additional Question sets that were originally exported from SRS and then were copied or imported into the ERS4 Training data set, are included in the ERS4 summary data. If each unit included them, they are available in the reports printed for the combined units, even though this is not the SRS directory where they were created. In fact, if you go look at the Subgroups, Filters, and Additional Question Sets, you will see that TRAINSRS only has the federal subgroups and filters and no additional question sets are defined.

SRS IMPLEMENTATION/START OF THE YEAR ACTIVITIES

Start of the year activities primarily involve optional customization of ERS for use in your state and are covered on the *Advanced ERS training tape* (Subgroups & Filters) and in the Advanced SRS portion of this manual (Creating Additional Question Sets, editing the Race Code Table and merging state-added foods with the federal Foods database).

SRS End of Reporting Year Tasks

Exercise 5. Explore SRS4 using the ERS Training Data
In the exercise above, you created a tables and a data directory, linked them to DB names TRAINTBL and TRAINSRS, and imported the Summary report data from several ERS4 units into TRAINSRS. You should spend time exploring all aspects of SRS using this "play" data set where it is safe to try things out.

1. **Try printing various filtered reports.** You can print a report for an individual unit or for all of the imported units combined.

2. **Browse** shows which summary reports have been imported into SRS with the unit and date generated. The four types of adult summary reports (Adult, Diet, Checklist, Perinatal) show the different versions of the summary report generated by the all the subgroups and filters for each unit, with the number of the clients included each summary and the date generated. (**Browse, Adult Summary**)

   If the filters listed under all the other units are missing for a unit, filtered summary reports for **All Units** in SRS will not include that unit. This can happen if an ERS unit failed to import a State-modified Subgroups and Filters file. In that case, state subgroups would be missing from that unit's Adult records for the entire reporting period. If the unit imports the Subgroups & Filters file at the end of the year and re-generates their export to SRS diskette, their filters will be correct, except for filters that include state-defined subgroups.

   Notice that you can't delete one filter version of a summary report for an imported unit without deleting all versions of that summary report. If you delete the Adult summary for a unit, the other filtered summary reports for that unit (Diet, Checklist, Perinatal) will remain. To recover summary reports that have been deleted, you have to re-import that report.

3. If you use Race subcodes, **preview the Race codes section of each Adult Summary report that has been imported. Go to Reports, Adult Summary, pick a unit in the Available Units list (ex. Training)**. **Then go to the top of page 2, the Gender and racial/ethnic characteristics section.**

   If a Race subcode was not imported by an ERS unit, their clients will not be shown as members of the subcode on their Adult, Youth, and Staff summary reports and the state summary report totals for all units will be off in the corresponding reports. This can distort your data and it is not easy to correct because when a race subcode was not available, the main race code would have been entered on each individual Adult, Youth, or Staff record.

The training data actually included a race subcode of 2-04 to indicate Haitian when it was created. Since Haitian is also defined by a filter, you can view the SRS Adult Summary with the Haitian filter to see how many 2-00s should change to 2-04s, if the ERS TableDB contains 2-04, when you export from ERS. Go to the Advanced SRS Exercise 6 to explore this.

It isn't enough to have the subcode defined in the SRS TableDB. The summary reports exported from ERS must have had the subcode defined for the subcode to be accurately reflected in the SRS state summary totals.

4. **Import some ERS V3 Summary Data** (disks that were imported into SRS 3.x from ERS 3) and then notice what happens with SRS reports by filter. You get the lowest common denominator--no filters--when you pick All Units, because the V3 imported data has no filter information.

5. **Import an ERS Diet Summary Report with a mixture of Nutrition Methods 1 & 2.** Notice that ERS gives a "blend" of the Nutrition Methods contributing to a report, which means that the number of graduates varies within the Diet Summary report. This happens on the unit level and carries over into the state level Diet Summary report. All graduates with Entry and Exit Recalls will be included in part *I. Summary of Dietary Improvement* (based on Food Group Servings), but only those with Nutrition Method 1 or 3 can be included in *part II. Summary of Calorie/Nutrient Improvement.* Only Nutrition Method 1 graduates are included in *part III. Distribution of Calorie and Nutrient Intake*. If all units were supposed to use Nutrition Method 1, and the number of graduates varies in parts I, II, or III of the Diet Summary, it suggests that records have been included where recalls were entered for Nutrition Method 2 or 3, by mistake.

6. **Export the TRAINSRS Summary Data to diskette for FRS.** Under Data Interchange, the Export button in the Import/Export Summary Reports generates a data disk like the one you send forward to the federal office with your real data. (EXPSUM40.MDB).

SRS IMPORT PROBLEMS AND ISSUES

Interagency

Interagency FY exported by unit doesn't fall in the FRS-defined Report Period, SRS can't import. Federal FY is 10/1/__ through 9/30/__.

Note that when the Interagency report in ERS prompts you to enter the FY, it is asking you to enter the year for the first day of the fiscal year, which is backward from the way most people identify data belonging to a particular fiscal year. If your report year starts before 10/1, you should use 10/1/__ for your Interagency FY start date to have SRS accept it, even though it differs from your defined report year start date.

Delete and re-enter Interagency fix.
A very common mistake in ERS is that the year for the end of the fiscal year was entered. It is a mistake that is not easy to correct and it perpetuates itself, not accepting the correct year, if it was mistakenly used in a previous year. Using ERS, you can fix an out-of-synch Interagency date by printing out the Interagency reports for each year and writing the corrected year date on each one (10/1/__). Delete all of the incorrect Interagency records and re-enter the one for the current year with the corrected month and year. It's up to you if you want to re-enter the prior years, they would be selectable and viewable in the current year, if available.

If V3.x IACDB.DBF file, dBase edit to fix.
If you are Importing from ERS 3.x, you could use dBase to edit dates in the file instead of deleting and re-entering data. Edit the IACDB.DBF file with a dBase editor to correct the FY field to the YYYYMMDD year, month, and day that represent the correct start date of the fiscal year for each record in the file (10/1/__). Once the individual records are straightened out, re-export the most recent Interagency summary, and SRS4 should accept it.

Interagency can't import an ERS 3.x exported file or gets data from wrong year

SRS can't distinguish between different interagency files, if they happen to be on the same diskette or in the same directory. SRS only looks for the first file that starts with "IAC" and assumes that it is the one it needs--IACYYMM.DBF (ex. IAC9710.DBF). If you happen to have an earlier year's export file on the same diskette, SRS will import that one because IAC9610.DBF comes before IAC9710.DBF in an alphabetical listing of filenames. The original interagency file, iacdb.dbf, will confuse SRS4 too, because it starts with "IAC".

Interagency--Double-counting of WIC or Food Stamps Offices

In situations where Units are in the same geographic area (ex. a Spanish-speaking unit and an English-speaking unit serving different audiences in the same city), you may get double-counting of WIC offices or Food Stamp offices. 4-H units who do not work directly with WIC or Food Stamps should not include any counts of WIC and Food Stamp Offices in their area.

Checklist only V3.3 or ERS4 will import

If you are importing summary data from Version 3.1, you will not get any Checklist Summaries. SRS4 only recognizes the 10 question version of the Checklist found in ERS 3.3. Upgrade the units to ERS3.3 and export the summary reports for SRS from there if you used the Checklist.

Staff, Double-counting problem

If units have Paraprofessionals whose work is recorded in more than one ERS directory, they will be double-counted on the SRS-FRS Paraprofessional Summary reports. This can happen when using a sub-directory to track a special population (ex. clients taught at a particular agency site).

SRS YEAR-END REVIEW OF DATA BEFORE EXPORT TO FRS

As you import your units' summary data, it is import to check that the data is complete, reasonable, and accurate. The training data will give you an idea of how you will use these steps to review your real data before exporting the SRS summary diskette for the federal office. Examine the summary reports for each unit separately, and the summary reports for the state as a whole, once all units' summary data has been imported.

1. **Import Status by Unit ID**. Look at the Import Status by Unit ID (or by Name)
   - verify that all of the units you meant to import have been imported and that all of the expected summary reports were received
   - **Common errors**
     Unit ID was typed in ERS with a letter O instead of a zero (not in alpha order)
     Missing summary reports-a unit failed to export one or more
       Adult Only units should have:
         A - Adult Summary
         D - Diet Summary
         C - Checklist Summary (optional, state-wide all units or none?)
         P - Perinatal Summary (optional, may only be a few units)
         S - Staff Summary (PP & Vol hours should have totals for year)
         I - Interagency

       Youth Only units should have:
         Y - Youth Group Summary
         S - Staff Summary (PP & Vol hours should have totals for year)
         I - Interagency

2. **Browse, Adult Summary.** Look at the Browse, Adult Summary
   - verify that the federal and state subgroups were included in each ERS unit and that #Adults figure looks correct:
     Filter named EFNEP for federal subgroup A (or other appropriate one)
     Filter named Sample for federal subgroup E (# should correspond to sampling plan)

3. **Browse Adult Summary Grads Only.** Look at the Browse, Adult Summary, Grads only
   - verify that the number of lessons for Grads fits with state recommendations p.5, #18
   - verify that the length of enrollment for Grads fits with state recommendations p.7, #20. Any Grads in the Entry row (0 lessons) suggests # lessons was not updated at exit

4. **Reports, Paraprofessional Profile.** Look at the Reports, Paraprofessional Profile
   - verify that the number of paraprofessionals, reported FTEs, and their gender and racial/ethnic characteristics accurately reflect the PP staff and their budgeted workload for the Adult and Youth components of each unit. Hours worked should have been updated

to reflect entire reporting year. Adult-only units should not have Youth PP FTE. Youth-only units should not have Adult PP FTE.

5. **Reports, Volunteer Profile.** Look at the Reports, Volunteer Profile
   - verify that the number of Volunteers, reported FTEs, and their gender and racial/ethnic characteristics make sense for each unit. Hours worked should have been updated to reflect entire reporting year. The default 1 hour per Vol x # Vols is usually less than 416 = .2 FTE for unit. Many volunteers, especially in the Youth program, contribute more than 1 hour. Adult-only units should not have Youth Volunteer FTE. Youth-only units should not have Adult Volunteer FTE.

   - verify that the total number of Vols on part 1 is less than or equal to parts 2+3. All Volunteers (1) should be <= # Youth (2) EFNEP Vols + # Adult (3) EFNEP Vols. (A volunteer who works with both the Adult and Youth program is only counted once in the "All Volunteers" report, but shows up in each of the Youth and Adult Volunteer Summary reports)

If the State distributed a Race Code Table with any race subcodes,

6. **Report, Adult Summary.** Look at the Reports, Adult Summary
   - verify that the race subcodes were utilized by previewing p. 2 for each individual unit

7. **Reports, Diet Summary.** Look at the Reports, Diet Summary
   • verify that the report sections expected for the Nutrition Method selected as state-wide default are present and that the number of graduates in those sections correspond with the Adult Summary number of graduates. If using Nutrition Method 2 state-wide, a smaller of grads in parts II and III due to some units entering data for Nutrition Method 1 is not really a problem. However, if the state-wide default is Nutrition Method 1, all three parts should have the same number of grads.

   (all 3 Methods) (Methods 1 or 3) (Method 1 only)
   Check that the # Grads in part I = # Grads in part II = # Grads in part III

State-wide default	**Diet Summary parts produced**
Nutrition Method 1	I, II, and III
Nutrition Method 2	I
Nutrition Method 3	I and II

II **Cross-check Your Totals on Similar Reports.** Cross-check your totals on Similar Reports:

a) # Adults who graduated on Adult Summary = # on Diet Summary = # on Checklist Summary
b) # Youth on Youth Summary = # Youth Delivery Mode

======= After going through the exercises with the TRAINSRS example data =======

Exercise 6. Use Filters with your Real Data from Last Year

1. Create directory, DataDB, & Attach it-- C:\SRS4\DATA97 (change year, if different)
2. Define System Configuration--should describe the data you will import to this directory
   Unit ID = your state 2 letter abbreviation + your county FIPS code (ex. FL012)
   Unit Name = "your state name" FY97 State Totals
   (ex. Florida FY97 State Totals)
   Period Begin = your state's reporting year start date
   Period End = your state's reporting year end date

3. If desired, Create State level Filters *(Advanced ERS tape/manual)* & export them to diskette for Unit level use (or just use default federal filters).

4. If you defined any state filters, have your units import your state-customized subgroups and filters file into their ERS4 directory for last year's data (DATA97) and then generate a new export to SRS diskette, which will now include the defined filters. As long as the filter doesn't depend on coding each record with a new subgroup, you will be able to generate filtered reports from this older data.

5. Import the filtered ERS4 export summaries into SRS4 and print any filtered state summary reports that are of interest (default federal ones include PregTeen, FoodStamp, and WIC)

SET UP A DIRECTORY FOR YOUR REAL DATA FOR THIS YEAR

If you have data from several years, you will need a strategy to keep them in separate directories and to readily recognize the contents of a DataDB. Naming the DataDB and the actual hard disk directory it is linked to with the same name is an easy way to keep the association straight. **SRS4 installed with a default directories and DBs named Data and Tables.**

1. Do you want to use the default names DATA & TABLES?

   If you do, skip to 2.
   If not, go to System Administration, DataDB & TableDB, Maintain, File Manager.
   a) Re-name DATA to DATA98 (or DATA99...)
   b) Re-name TABLES to TABLE98 (or TABLE99...)
   or c) Create an additional directories called DATA98 and TABLE98
   d) Associate DataDB name DATA98 with the directory DATA98
   e) Associate TableDB name TABLE98 with the directory TABLE98
   f) Attach DATA98 and TABLE98

The SRS Tools, System Administration and Data Interchange aspects of SRS parallel those in the ERS unit level which are covered on the *Basic ERS training tape*.

2. Go to **System Administration.**
   Under **System Configuration** enter the correct Unit ID (state 2 letter abbreviation + 3 digit FIPS code for the state), Unit Name, and current reporting period dates.
3. Use the **Security Functions** to create 2 new users with executive privileges. Once they have been tested & the new users are comfortable accessing SRS, delete the default ERS user.
4. Plan a **Backup** strategy. It should fit the schedule you collect data from units (usually once a year) but it should be daily for that week when you are doing all those imports.

Working in your REAL data directory for the Current year:

5. If any State Customizations are to be done, refer to the Advanced SRS and ERS parts of the training manual and the *Advanced ERS tape*.
   a) Create/Edit any State Customizations:
      Checklist Additional Question Set(s)
      State level Subgroups & Filters
      State-modified Foods database
      State-modified Race Code Table with subcode(s)
   b) Prepare Customized Diskettes and Instructions for unit level, either as separate import files or an "All in One" diskette for initial ERS setup.
6. Prepare any federal Updates to ERS for unit level (program updates, any updated data files not being customized by state).
7. Distribute CD/diskettes, specific instructions about set up and use of ERS in your state, and forms to your units.
   a) ERS4 CD or Installation diskettes
   b) federal Update diskettes (if any)

c) State Customization diskettes (if any)

SRS END OF THE REPORTING YEAR TASKS (REAL DATA)

1. Check which DataDB you are using and change if it isn't correct.
   System Administration
   DataDB & TableDB, select correct DataDB and TableDB, Attach

2. Import Status.
   For each ERS4 unit, insert their diskette (check diskettes for viruses first).
   Import Summary Data
   Next,
   Review the information displayed. You get a yellow warning box if SRS can't import.
   - Unit ID and Name correct?
   - Report Begin and End dates correct?
   - Each expected Summary Report marked as Can Import?
   - Each desired Do Import box marked? (Sometimes you only want to import one or two corrected summary reports, not all of them, and you would un-mark boxes of the reports you do not want.) Make sure that the As-of date at the top of the screen (represents the data on the diskette) is newer than any Existing Import As Of date.

3. Click on Reports Button
   a) pick button for each type of report that you have imported data for, in turn
   b) pick ALL UNITS, then click on Next, and Preview or Print to generate the state summary report for that type
   once ALL UNITS summary reports are complete and make sense,
   c) pick any relevant filter, such as PregTeens, FoodStamps, or WIC and generate for ALL UNITS

What you print for reports depends on what filters and subgroups you created and wish to have:
All units or an individual unit
All clients in directory or an Individual Filter
- All clients or Grads only (on Adult Summary)

4. Go through the steps in the earlier section called "SRS Year-End Review of Data before Export to FRS."

5. When data looks ready, go to Data Interchange and Pick Export under Import/Export Summary Reports to prepare diskette to send to the federal office.

SRS Start a New Report Year

Starting a New Report Year in SRS basically consists of creating a new DataDB for the new Reporting Year and setting the System Configuration to the new dates. **Unless the federal office or state changes the Race codes or Foods Database, the SRS TableDB and directory won't change from year to year.** You will need to prepare new export diskettes from SRS, if you are changing any state customizations (Subgroups & Filters, Additional Question Sets, Race subcodes or state-added foods).

1. If any State Customizations are to be done,
   a) Create/Edit State Customizations
   b) Prepare Customized Diskettes and Instructions for unit level--might do separate import files or an "All in One" diskette for initial ERS setup

2. Prepare any federal Updates to ERS for unit level (program updates, files if not customizing).

3. Distribute CD/diskettes, forms, and specific instructions about the setup and use of ERS in your state to your units.
   a) ERS4 CD or Installation diskettes
   b) federal Update diskettes (if any)
   c) State Customization diskettes (if any)

APPENDIX 1. CHANGES FROM SRS & ERS 3.X

The Windows version of the EFNEP Reporting and Evaluation program offers some exciting new possibilities in the information which can be entered into the system and the reports that can be generated from it.

New Components include:

Subgroups and Filters

Additional Question Sets for the Behavior Checklist (EFNEP Survey)

Perinatal Projects

New Features Added to Components of ERS/SRS 3.x

Adult

Each Paraprofessional can be assigned a Range of Adult ID numbers, which makes it easier to associate clients with PPs when PP Lists are printed in ID order.

PP Lists of Families, all Summary Reports, and even mailing labels can be printed for subsets of your Adult clients, as defined by filters and/or subgroup codes. This can allow you to give very specific feedback to partner agencies on the impact of EFNEP in working with their particular audience (Adult demographics, Diet Summary, Perinatal Summary, & Behavior Checklist).

Youth

The PPARS Impact Indicators can be entered for each Youth Group--check if it applies and enter the percentage "who met the criteria of the indicator" for:

- Eats a Variety of Foods
- Increased Knowledge of the Essentials of Human Nutrition
- Increased Ability to Select Low-cost, Nutritious Foods
- Improved Practices in Food Preparation and Safety

Nutrition - (Foods Database used in Nutrition Method 1)

The primary location for making changes to the Foods database has been shifted to the Tables section in SRS. Until now, you could only add and edit foods in the ERS program and any changes you made were flagged with a "U" code, meaning Unit level. While this feature has not been disabled in ERS, it is very important that individual units do NOT edit the foods database with ERS. This affects state-wide consistency and your ability to apply foods database updates. See "How to Merge State-added Foods with new Federal Foods." in the Advanced SRS section for more information.

General New Features of ERS4

SRS & ERS

Network-ready	Can keep DataDB and TableDB files on a network server and update them from computers connected to the network, which have the SRS4/ERS4 programs installed on their local hard disk. It is slower than a stand-alone installation, but offers advantages when multiple people need access to the same data at the same time.
Security	Protects the privacy of your clients by restricting access to their data. You must logon with a User Name and Password on both the main program (ERS or SRS), and the auxiliary program (ERS Tools or SRS Tools). Default logon Name: ERS and Password: ERS. Change the defaults.

SRS

SRS Tools	Separate from main SRS program, Tools contains functions to Repair/Compact databases (SRS ApplicationDB, DataDB, TableDB), Backup, Restore, and Install Software Update. Icon (ambulance on a diskette) appears on Main Switchboard and closes main SRS program before opening Tools.
Import V3 Summary Data	Will import the summary files exported from V 3.3 and V 3.1 for SRS. Can use to bring prior years' Data files into SRS4 but will not get filtered summary reports for past years (must go through ERS4 to apply filters).

ERS

ERS Tools	Separate from main ERS program, Tools contains functions to Repair/Compact databases (ERS ApplicationDB, DataDB, TableDB), Backup, Restore, and Install Software Update. Icon (ambulance on a diskette) appears on Main Switchboard and closes main ERS program before opening Tools.
Notebook Feature	Copy data to a laptop, add records in field, then merge data with office computer's data. Units with no network can use during year end crunch to allow two people to update records in the same database at the same time.
Export to dBase III	Will export data in dBase III format, allowing for manipulation by other programs. File structures are NOT the same as V3.3 or earlier.
Import V3 Tables	Will import tables files from V 3.3 and V 3.1. Use to bring prior years' Tables into ERS4.
Import V3 Data	Will import data files from V 3.3 and V 3.1. Use to bring prior years' Data files into ERS4. Can then print filtered summary reports for past years.

APPENDIX 2. ERS4 ROLL-OUT DECISIONS

Implementation/Timing

New to ERS?	Collect new forms as soon as possible (from the start of a report year). Data-entry can lag a little, though it is best to have everyone ready to start together.
Used ERS 3.x?	
Start of the Report Year-	Implementation is straightforward. Do Start New Year in 3.x.
Mid-year Transition-	Not difficult, introduce needed changes to forms as early as possible (ex. Subgroup codes, new exit reasons...). You will only have new components/features data for part of the year, unless those already graduated or terminated can be updated with the additional data.

Which Training videos for whom? Supervisor...Data-entry personnel
Documentation- CD or printed?
Create/Modify Forms for your state
Media- CDs, Diskettes, or mix?
Need any State-modified files on diskette?
Any ERS4 updates to be distributed on diskette?

Everyone new to ERS4 should pick the New Install option.

APPENDIX 3. RACE CODE TABLE WITH FEDERAL SUBCODES 3/98

RACE CODE	RACIAL GROUP
1-00	White
1-01	Caldean
1-02	French Canadian
1-03	Portuguese
2-00	Black
2-01	African American
2-02	Creole
2-03	Ethiopian
2-04	Haitian
3-00	American Indian/Alaskan
3-01	Alaskan
3-02	Aleut
3-03	American Indian
4-00	Hispanic
4-01	Caribbean
4-02	Central American
4-03	Mexican
4-04	South American
5-00	Asian or Pacific Islander
5-01	Cambodian
5-02	Chinese
5-03	Filipino
5-04	Hawaiian
5-05	Hmong
5-06	Japanese
5-07	Korean
5-08	Laotian
5-09	Micronesia
5-10	Mixed (Non-Hawaiian)
5-11	Samoan
5-12	Vietnamese

APPENDIX 4. REINSTALLING SRS4?

You will need to decide whether to pick "New" or "Use Existing DataDB/TableDB" on the installation and understand the effects of your choice.

A "New" install replaces any data in C:\SRS4\DATA and C:\SRS4\TABLES. This would wipe out any customizations you may have done in Subgroups & Filters, Additional Question Sets, Race codes, or the Foods database, in the directories named c:\srs4\data and c:\srs4\tables. Any DataDBs or TableDBs in directories with names like DATA98 or TABLE98 are ignored by the new option and will not be harmed by it, though you will need to go to DataDB & TableDB Maintenance and re-create the DataDB and TableDB names and link them to your existing directories.

The "Use Existing DataDB/TableDB" choice on the install preserves all the customized data you have in any data and tables directories. If you have multiple DataDBs and TableDBs defined, the links to them within SRS4 are also preserved.

If you had imported V3.x Tables into your SRS4\TABLES directory, they will still be there after a "Use Existing DataDB/TableDB" reinstall. To get the 3/98 CD version of the tables files installed while preserving the V3.x ones, you will need to do a new install to a different directory (ex. C:\SRS4A), or rename your old SRS4\DATA and SRS4\TABLES directories to something else first (ex. C:\SRS4\DATAOLD and C:\SRS4\TABLEOLD). You can import the federal files individually from the CD, if needed.

If updates have been released on the ERS4 web site, they will need to be downloaded and then imported individually, replacing one or more of the CD files.

A. Have real SRS4 data/customizations in c:\srs4\data and/or c:\srs4\tables and want to preserve DataDB & TableDB connections for multiple directories in SRS4:
   1. pick Use Existing DataDB/TableDB
   2. install federal files from CD and/or updates from the web site, as needed
   3. modify with any additional State customizations.

B. Have real SRS4 data/customizations in c:\srs4\data, but want federal 3/98 CD versions of race codes, foods database, subgroups & filters, and additional questions; which may then need state modifications:
   1. pick New, but install to a different path OR rename your original data directories before doing the new install
      (under System Administration, DataDB & TableDB, Maintain)
   2. edit or Add DataDB name and link to each data directory
   3. edit or Add TableDB name and link to each tables directory
   4. Install/Import updates from web site, as needed
   4. modify with State customizations.

APPENDIX 5. WHAT SRS BUTTONS TO USE, WHEN--START OF THE YEAR, YEAR-END

SRS Start of Reporting Year

- System Administration
  - Security
  - System Configuration
  - DataDB & TableDB
- Data Interchange (import federal/state versions)
  (NEW installs 3/98 federal versions)
  - Foods Database
  - Race Codes
- Behavior Checklist Questions *(optional)*
  - Import Questions *(NEW installs 3/98 federal version)*
  - View/Edit Question Sets
  - Export Sets
- Subgroups
  - Import Subgroups & Filters *(NEW installs 3/98 federal versions)*
  - View/Edit Subgroups
  - View/Edit Filters
  - Export Subgroups & Filters
- Tables
  - Race Code Table, modify subcodes
  - Foods Database, if adding new foods
- Data Interchange (export state versions)
  - Foods Database
  - Race Codes

SRS End of Reporting Year

- System Administration
  - DataDB & TableDB
- Import Status
  - Import Summary Data for each ERS4 unit
  - Import Status by Unit ID or Name
  - Import Status Report for printed list
- Data Interchange (if importing ERS 3.x summaries)
- Reports (generate each state summary report)
- Data Interchange (Export Summary Reports to diskette for federal office)

APPENDIX 6. STANDARDIZE ERS4--DISTRIBUTE AN "ALL IN ONE" DISKETTE

In order to have consistency throughout your state on all the imports for question sets, subgroups & filters, foods database, and race codes; you may prefer to "get it right" on an "empty" ERS4 data set at your state office and copy the ERSDAT40.MDB and ERSTBL40.MDB files to diskette for distribution to all your units. The DataDB file can only be used during initial setup/ERS 3.x conversion because continuing clients would be overwritten with "empty" files by copying the ERSDATA40.MDB file.

TableDB
A TableDB file is standard throughout a state for a given report period, except for the Poverty Guidelines Table update around March of each year. It contains no client information or unit-specific data and can be shared by multiple DataDB files on the same ERS computer. Because the Foods database might be accidently modified if units don't pick "Complete Replacement," your state may chose to distribute a diskette with a standard TableDB. Each unit would copy it to their TableDB directory, rather than having to import the Foods database and/or Race subcodes as individual files.

To Utilize an "All in One" Diskette, Units would:

A. First-time ERS User

1. do a NEW installation of ERS4
2. if not using default Data dir & DataDB for their real data, they will have to create the dir
3. if not using default Tables dir & TableDB for their real data, they will have to create the dir
4. copy the ERSDAT40.MDB to their REAL data directory (C:\ERS4\DATA or DATA98)
5. copy the ERSTBL40.MDB file into their REAL tables directory (C:\ERS4\TABLES or TABLE98).
6. open ERS4 and attach their empty REAL DataDB and TableDB
   - if not using default Data dir & DataDB, have to create DataDB & link it to their data dir
   - if not using default Tables dir & TableDB, have to create TableDB & link it to their table dir
7. open ERS Tools and
   a) Repair/Compact DataDB
   b) Repair/Compact TableDB
8. open ERS, edit System Administration, System Configuration
   a) Enter actual Unit ID, Unit Name, Period Begin & End, Nutritional Method

   Results in an "empty" data directory associated with custom subgroups, filters, additional questions, and a tables directory with custom race codes and foods database.

B. User Converting from ERS 3.x to New Install of ERS4

1. do a NEW installation of ERS4

2. if not using default Data dir & DataDB for their real data, they will have to create the dir
3. if not using default Tables dir & TableDB for their real data, they will have to create the dir
4. copy the ERSDAT40.MDB to their REAL data directory
   (C:\ERS4\DATA or DATA98)

5. copy the ERSTBL40.MDB file into their REAL tables directory
   (C:\ERS4\TABLES or TABLE98).
6. open ERS4 and attach their empty REAL DataDB and TableDB
   - if not using default Data dir & DataDB, have to create DataDB & link it to their data dir
   - if not using default Tables dir & TableDB, have to create TableDB & link it to their table dir
7. Import their current V3.x Data into ERS4 (Data Interchange)
8. open ERS Tools and
   a) Repair/Compact DataDB
   b) Repair/Compact TableDB

Results in their V3 data associated with the custom subgroups, filters, additional questions, and a tables directory with custom race codes and foods database. The EFNEP subgroup code is automatically appended to each adult client during the V 3.x data import. For any other subgroup, each applicable Adult client must have the appropriate subgroup code entered.

Table of Contents - State Level Advanced SRS

ADVANCED SRS

State level customization of the ERS program has the goal of letting each state adapt ERS to best meet their needs. Once the supervisor has made decisions about what customizations will be used, this portion of the training manual addresses how to implement the customizations. Attach the Training DataDB--TRAINSRS and TableDB--TBLSRS when you want to play with customization (created in Basic SRS Exercise 1), but be sure to attach your "Real" DataDB and TableDB when preparing customizations that you intend to distribute to your units.

IS CUSTOMIZATION NEEDED?

The ten base questions of the Checklist and the Perinatal component do not need any special setup, they are available with the installation of ERS4. At the Start of the Report Year, the state office will need to prepare and distribute files on diskettes with instructions on how to set up and use them in ERS if the supervisor answers any of the following with Yes:

1. Any Additional Checklist Question Set(s) to be created and used state-wide?
2. Any Subgroups to be created and used state-wide?
3. Any Filters to be created and used state-wide?
4. If Nutrition Method 1,
   Any state-added foods that must be merged with the new federal foods?
   If no, do you have state foods to add in SRS now?
5. Any Race subcodes to be used state-wide?

The ERS program has been designed to minimize potential data entry errors, but the complexity of the various components and flexibility necessary for its use by various Nutrition Education programs have left potential problems which can affect your state summary reports. It is essential that all units within a state correctly install and utilize all state customizations as well as the federal subgroups. Checklist Question Sets, Subgroups, and Filters are part of the DataDB. The Foods database and Race Code Table are part of the TableDB.

Options for Distributing State Customized files to Units

1. Individual Customized Files Exported from SRS for ERS use.
Depending on how many features your state decides to customize, you will be exporting one to four customized files for ERS use.

State using: Filename Exported from SRS:

Additional Question Sets? (*SRS must create,* **CKQSET40.MDB**)
Any State Subgroups? (*SRS must create, part of* **SUBGRP40.MDB**)
Any State Filters? (*SRS must create, part of* **SUBGRP40.MDB**)
Any State-added Foods? *(Nutrition Method 1 only, SRS modifies* **FOODS.DBF***)*
Any Race subcodes? (*SRS must modify,* **RACES.DBF**)

Note that the filenames for files to be imported into SRS from Federal and into ERS from State are identical for the Subgroups & Filters, Foods Database, and the Race Code Table. It is important that you keep straight which version of the file has your state modifications, distribute the correct one, and help your units to recognize when they have the correct version installed.

Units with older V 3.x versions of the Foods.dbf and Races.dbf might accidently import an old version instead of a new one, or overwrite the new with the older version, because the dates on the foods.dbf and races.dbf files changed to the current date whenever you packed the databases. Since packing the databases is a step in the upgrade process, it is likely that they will have newer file dates on their "old" foods.dbf and races.dbf than the "new" versions you will distribute with state customizations.

2. Standardize ERS4--Distribute an "All in One" Diskette

In order to have consistency, instead of having units import the different customized files into ERS, they could just copy two. You can "get it right" on an "empty" ERS4 data set at your state office and copy the ERSDAT40.MDB (DataDB) and ERSTBL40.MDB (TableDB) files to diskette for distribution to all your units. You can only distribute the DataDB file when units are first setting up ERS4. After the first year you will need to do individual imports of question sets and subgroups & filters to avoid overwriting continuing clients. Review the additional information in appendix***** "Standardize ERS4--Distribute an 'All in One' Diskette"

SRS BEHAVIOR CHECKLIST QUESTIONS

The Behavior Checklist Questions Switchboard is used to manage the new "Additional Questions" feature, which allows states to customize the Checklist contents by adding supplementary questions to the basic ten. Each state has the option of assembling one or more Additional Question Sets from the federal Question Master File. There are 85 Additional Questions in the Question Master File on the 3/98 CD. View SRS Manual Volume 3 for information on the guidelines, documentation, and the development of Additional Questions.

Exercise 1. Explore the Behavior Checklist Questions Switchboard, Create an Additional Question Set for the Behavior Checklist

"Behavior Checklist Questions" Button

1. Click on the SRS Main Switchboard "Behavior Checklist Questions" button to open a switchboard with 3 columns of buttons. The left side deals with the federal Master Question File which is included with a **New** SRS install. If you picked "Use Existing DataDB/TableDB", the master question set can be imported from the ERS4 CD \OTHER\CKQMAS40.MDB file or a website download (if an update has been released) using the "Import Questions" button at the bottom of the left column.

"View Questions by" Box

You can view the Question Master file in SRS under Behavior Checklist Questions, organized by "area", question ID, or question text. Each question is classified as belonging to a **primary area** and may also be coded for a secondary area. Codes are listed in the SRS Vol 3. Manual, Behavior Checklist, "Codes for Secondary/Primary Areas". Examples would include CA-Cooking Attitude, KN-Knowledge, MM-Money Management, and SE-Food Security.

The Behavior Checklist Summary Report organizes the behavior checklist questions into three broad content areas:

FR Food Resource Management practices
NP Nutrition practices
FS Food Safety practices

2. Let's click on the "Primary Area" Button. As you can see, the Browse list shows the code for each question's Primary area in the leftmost column, you would type a Primary code in the Locator box to search for it.
3. Let's locate the questions with **Food Security** as their primary area.
   First type an "L" to move the cursor into the box, then
   type **SE** in the locator box and press Enter.

Notice that the secondary area for these questions shows in the second column as FR or NP. Question ID is in the third column. Questions submitted by a particular state have the 2 letter state abbreviation as the start of the question ID. The fourth column displays the question Type which can be L for logical (Yes/No or True/False), 5 for 5-choice (responses coded 1-5), 4 for 4-choice (responses coded 1 to 4) or N for numeric. The **Question text** is a shortened version of the actual question you would be asking on your form.

4. **Let's click on the explode button [...] for the second SE question, CA045 "Worry food will run out",** to open the "Question View" which gives full details about the question. The "**Aid**" lists the possible responses to the question. While adding or editing a Checklist in the ERS program, the aid message appears in the lower left corner of the screen when you click on the question. Notice the "**User Text**" is the full text of the question you would use on your form. The Response list gives the possible responses a client may make. The Scores are associated with the responses directly above, in this example the scores are reversed from the responses. Scores trigger which message will print on the "EFNEP Survey Diagnostic Report", a client feedback piece available in unit level program, ERS.

The "**Good Message**" is what prints under "Your EFNEP Survey shows:" if the client's response registered as a "Good Score". The "**Learn About Message**" is what prints under "You may want to learn more about the following:", if the client's response registered lower than the "Acceptable score". Some questions also have an "Acceptable" message that would print in the "Your EFNEP Survey shows:" section if the client's response meets the "Acceptable", but not the "Good" score.

5. Click on File, Print Screen to print the details for a question. You would click on OK to print.

6. Click on Cancel and then press ESC to go back to the Browse list of Questions by Primary Area. The full details for **all** of the questions in the Master Question file can be viewed or printed in the Question Detail Report.
7. Now Click on the "explode" button for the first question 003 "Cut size of children's meals". As you can see, the Logical type question only has two choices, Yes or No; and either prints the "Good Message" or the "Learn About Message", for every client.
8. Press ESC twice to go back to the Behavior Checklist Questions Switchboard.

Question Master File

The middle column of the switchboard provides two reports of the entire **Question Master file**. The **Question List Report** is a 3 page report that gives a shortened, 1-line form of each question in the master question set with it's primary and secondary areas, type, ID number, and can be viewed or printed by "area", question ID, or question text.

9. Click on the Question List Report
10. Click on "Primary Area", then Preview,
11. ESC twice to go back to the Behavior Checklist Questions Switchboard.

The **Question Detail Report** is 40+ pages, but includes full details on each question in the Question Master file. This is the same information we saw earlier when we hit the explode button for a question under the "View Question by, Primary Area button".

12. Click on the Question Detail Report, then Preview

You will want to study the details of any questions you plan to build into your own Question Set(s). Some questions are meant to be paired--you'll want to add both to your set. Some 4- and 5-choice questions show different "Aid Messages", which you may want to consider in preparing your form. It is a good idea to test any question set you build in ERS to see that the questions work the way you expect on the EFNEP Survey Diagnostic Report and other reports, before you distribute it out to all of your units. One way of testing is to answer one survey with all extreme negative responses to trigger all the "Learn About Messages". On another survey, respond with all extreme positive responses to trigger all the "Good Messages".

13. ESC once to return to the Behavior Checklist Questions Switchboard.

The right column buttons on the switchboard deal with the Question Sets that you build in SRS from the Question Master file for use in your state. You may create several "Additional" Question Sets to use at the unit level, tailored for different audiences, with a maximum of 15 questions in a set. A particular client can only have data entered for one "Additional" Question Set, and both Entry and Exit surveys must be entered before the record will be included on the Checklist Summary Report.

Create a new Question Set

14. Click on the "**View/Edit Question Sets**" button**.** The browse list is empty until you have created a Question Set.

Before you create a Question Set on the computer, you will want to carefully review the source materials in the SRS Manual Volume 3 and the Master Question file question details. You will already have decided what area to focus upon, which questions you will include, and possibly the order to present them. Have the list of questions in ID order to make it easy to pick them. You will need a Set ID of up to 8 alphanumeric characters (though only first 6 display in browse list). You can have a Title of up to 60 characters. You also need a Set Description which can describe the purpose of the set and provide guidelines for its use. The Set Description will appear in ERS in the Question Set Report or when you view the contents of an individual Question Set.

15. **click on the "Add Set" button** to start entering our first Additional Question Set.

You must assign a descriptive **Set ID** (up to 8 letters and/or numbers)--

16. **type "SAFSHOP1"** for our set ID, because will be selecting additional food safety and food shopping questions.

The "**Title**" will appear on the ERS browse screen where they can "View Question Sets", as well as on the "Question Set Report" available in both SRS and ERS.

17. for the Title, type **"Washing and Shopping Practices**".
18. For the **Description**, type "**Use with clients that do grocery shopping and food preparation."**

19. **Click on the Explode button** [...] to begin assigning questions to the set.

20. **Click on the Add Question button,** notice that questions are only available listed in ID order.
21. Pick a question by clicking on it with the mouse to highlight it and then click the right arrow button to display it in the "Questions in set" box. **Pick questions 16, 27, and 28** from this first screen.
22. Now drag down the slider bar down to see more questions, and find **PA088**. Click on it and then the right arrow key to add it to the Questions in set box on the right.
23. Click on the Exit Door to leave this screen when you have added all of the questions you want.

On this View/Edit Questions in Set screen, you order the questions in your set by assigning each question the number it should be in the column under Sequence. As you enter a sequence number, it automatically re-sequences the questions, so it can be tricky.

24. **Enter a 1 for question 028 sequence, and a 3 for question 016 sequence.** When satisfied with the order, **click on the Exit Door** to go back to the previous screen. Notice that on this Add Question Set screen, the "Questions in set" are still in ID order, not the sequence that we assigned, this is ok.
25. If satisfied with everything, **click on Save** to save this Question Set. You are prompted for another Set ID, **pick Done** unless you are going to create another Question Set.

The browse screen shows our new Question Set, SAFSHOP1. You can click on the explode button to edit it. You can click on the Printer button, and Preview or print the Behavior Checklist Question Set Report for just that Question Set. ESC twice to get back to the Behavior Checklist Questions switchboard.

The "**Question Set Report**" lists each question included in the Question Set, with it's ID, Type, primary and secondary areas, and total number of questions; with each defined Question Set on a separate page.

Export Question Sets from SRS to ERS

You can export sets from either the Behavior Checklist Question switchboard or the Data Interchange switchboard.

1. **Click on the "Export Sets" button** to prepare a file on diskette that can be imported into ERS. Available question sets will display in the box on the left.
2. **Click on the set to highlight it,** then **click on the right arrow ">" button** to add it under the "Sets to Export" box on the right. You can remove one from the Sets to Export box by highlighting it and clicking on the left arrow "<" button.
3. Then **click on the Next button.** You can add an Export Title or Description that will be displayed on the ERS screen when attempting to import this Question Set.
4. **type "Example Question Set from TRAINSRS".**
5. to put this file on a diskette, **insert a blank diskette in drive A:** and accept the prompted destination.
6. **Click on Export** to put the CKQSET40.MDB file on the diskette. Message box displays "Export to A:\CKQSET40.MDB completed successfully. OK".
7. Press Enter or click OK to continue. ESC or click on the Exit Door to return to the Behavior Checklist Questions switchboard, then ESC to go to the Main Switchboard.

Managing Question Sets

Question Sets may be edited, but it is not a good idea to add or delete any questions in a question set once it is in use at the unit level. Continuing clients will have Checklists using the previous version of the Question Set and their Entry surveys may be invalidated and lost to the Checklist Summary Report if questions are added or missing. The same problem occurs if you discontinue a Question Set. Continue to re-issue the set as long as you may have continuing clients who used it, but advise your units not to use it for any new clients. Even adding questions to a previously used Question Set and re-issuing it under the same Set ID and name could be problematic with continuing clients. A wiser policy might be to create a new Set ID and name copying the contents of the previous set, and then adding or deleting questions in the new set.

SUBGROUPS & FILTERS

In the *ERS Unit level (Advanced)* training tape for Installing and Implementing ERS, we covered the creation of Subgroups and Filters. The process of creating, editing and deleting subgroups and filters is identical in SRS and ERS. The difference is that when Subgroups and Filters are created with SRS and exported for use in ERS, the summary data exported from ERS back to SRS contains those Subgroups & Filters and allows SRS to generate state-wide summary reports using the federal or state level filters.

A useful ERS year-end filter would be to print a PP List of Families for Grads who had 0 lessons entered, or less than 3, or whatever your state's minimum criteria might be. This would allow units to correct Grads that hadn't had the number of lessons updated before generating summary reports. At the SRS level, any unit with any entries detected on the Adult Summary with this filter, could be reminded to do this check, update the number of lessons and re-submit their data. (Adult Summary #20 shows Grads with 0 lessons, 1-6 lessons, 7-12 lessons...)

A filter for a race subcode can be used to generate summary reports for a population of interest. In the original ERS Training data, Haitian was a race subcode, 2-04, and it was also defined by a filter so that the data could be summarized for the Haitian population. The ERS install only has the 5 main race codes, so the Adult Summary report of the Training DataDB does not print a separate line for the Haitian subcode or export them to SRS. You can view the SRS Adult Summary with the Haitian filter to see how many 2-00s should change to 2-04s, if you attached a TableDB with a Race Code Table containing 2-04, before exporting summary data from ERS. This partially illustrates the problem of a unit not importing and utilizing a race subcode which the state has designated. The difference is that by attaching a TableDB with the race code 2-04 defined as Haitian, the Training data will show the "missing" Haitians. In reality, unless a race sub-code is defined in the TableDB, the unit can't enter it for any Adult, Staff, Volunteer or Youth and the State summary report totals for all units will be off in the corresponding reports.

Import/Export Issues

More subgroups & filters, slower exports from ERS to SRS.
If you brought the Training data into SRS, you have already experienced the ERS export process and noticed how each Adult, Diet, Checklist, and Perinatal summary report is generated for each filter. The time it takes to generate export files at end of the year is a factor to consider in how many state level filters you want to create for your units to use. The trade-off is that in order to get a state-wide summary of a filtered report, it must be a state or federal-defined filter and all units must have both installed the filter and coded any involved subgroups properly throughout the reporting year. The Training data probably contained more filters than you would typically want to require.

State-defined subgroups & filters are still present after importing a new federal subgroups & filters file. Similarly, unit-defined subgroups & filters are still present after importing a new SRS exported file with federal and state subgroups and filters into ERS unit level. **Copying the ERS DataDB (ERSDAT40.MDB) rather than importing Subgroups and Filters at the local level would cause any defined local subgroups and filters to be lost.**

Previously used subgroup/filter name
If you import federal subgroups & filters to SRS, or state & federal subgroups & filters to ERS, and a subgroup and/or filter of the same name was already defined, it will re-name the lower level subgroup/filter (ex. Federal subgroup/filter Sample caused rename of State subgroup and filter to SampleS in ERS Training data).

Export from SRS to ERS
You can export Subgroups and Filters either under Subgroups Switchboard or Data Interchange. **Data Interchange**, **Export** under Import/Export Subgroups and Filters, prompts with A:\SUBGRP40.MDB destination, **Export** to start.

Exercise 2. Apply new state filters to ERS 3.x data (refer to ERS Advanced tape/exercises)

a) Create a subgroup
b) Create a filter. Try manual revise.
c) In SRS, Create and export filters that you would like to use on your state's data,

then in ERS Create & Attach a DataDB and directory for a unit's data, then import V 3.x Data.
ERS Import the SRS Subgroups & Filters to the ERS directory with the unit's data.
ERS Generate summary reports w/filter and export.
then in SRS Import summary reports and Browse, Adult Summary to see filtered ones

WORKING WITH THE FOODS DATABASE

How to Merge State-added Foods with new Federal Foods

Picked New on original SRS Install

If you picked **New** when installing SRS, it automatically loads all of the 3/98 CD federal tables. This includes the changes to the foods database that have been made since the release of ERS 3.3, in October, 1997. These are listed in "Revisions to Database, February 1998", located in the Volume 3 Manuals for both SRS and ERS. If you have not already upgraded to ERS 3.3, also review the extensive additions and changes that were made at that time in "Revisions to Database, October 1997".

Which version of the federal foods database do you have installed?

The last Food ID in the federal foods database for various revisions:

7/93 Original	1338 ZUCCHINI, SQUASH CALIENTE
4/95 Rev.	1377 MARSHMALLOW CREAM
10/97 & 2/98	1540 BEEF, PASTRAMI
2/98 Rev.	504 EGG, WHITE ONLY, RAW was DELETED--if it's still there, you haven't installed the 2/98 version of the federal foods

If you have Added Foods in the Past

Both the unit and state level programs allow you to merge a database containing state-added foods with the new federal foods database in ERS4. In the past, foods could only be added in the unit level program, ERS, and all changes received a Datafrom code of "U". It is preferred that changes to the Foods database be made only at the state level, now using SRS, to ensure state-wide consistency. When Importing a Foods Database, the "Retain Local Changes" option is level-specific, SRS expects a Datafrom code of "S", ERS expects a code of "U". **Before the state level program SRS can correctly retain and test changes to the foods database made with the unit level program ERS, you will need to use dBase or some other program that can edit .dbf files (ex. MS Excel) to change the code in the "DATAFROM" field from U to S.** This will indicate that it is a state level change that you wish to retain and test for duplicates against the new federal foods using SRS, Data Interchange, Import Foods Database.

dBase Considerations

If you use dBase to look at the new foods.dbf from federal, you will notice that the structure has changed and that many fields are much wider than previously. This is also true of the other files generated at the unit level by Data Interchange, Export to dBase III. It is hard to browse the foods.dbf file on screen, but the actual field contents are the same as in the ERS 3.x foods.dbf. In order to make listings and browsing easier, the foods.dbf can be appended to an empty .dbf file with the structure of the former ERS 3.x foods database. SRS4 correctly imports foods.dbf in the 3.x structure and will export it in the new structure for use in ERS4. The dBase III+ command to change all the U codes to S would be:

```
Replace DATAFROM with "S" for DATAFROM="U"
```

If You Use Nutrition Method 1 and Have State - Added Foods

Exercise 3. Merge your foods database with the new federal one.

Merge Foods Databases--Steps to Accomplish:

1. Use dBase (or other program) to change all DATAFROM field "U" codes to "S" in your state's foods.dbf
2. import your state's version of the foods.dbf into SRS4,
   a) in SRS, pick Data Interchange
   b) in the Foods Database box, pick Import
   c) for import strategy, **pick Complete Replacement**
   d) if not on drive A:, Browse to find foods.dbf file & click on it to select it
   e) pick Import
3. import the new federal foods.dbf
   a) in SRS, pick Data Interchange
   b) in the Foods Database box, pick Import
   c) for import strategy, **pick Retain Local Changes**
   d) if not on drive A:, Browse to find foods.dbf file & click on it to select it
   e) pick Import
4. as duplicate food IDs are displayed, carefully note the differences between your state version **and the new federal version. You will usually pick the federal version nutrient analysis and may edit Food name for consistency with state usage later.**

As you import the new federal foods database to merge with your own (pick Retain Local Changes), only foods coded with S will display when there is a difference from the federal foods database for the same Food ID. All foods with the U code are deleted, so any locally-added foods would be removed, if you had not already replaced the U codes with S codes in your foods database. This side-by-side comparison of state and federal duplicate Food IDs allows you to evaluate what is different and to determine which one to keep. In general, only keep the state food when the difference is strictly in the Food name/descriptive label. The preferred approach is to adopt the federal food entry whenever nutrient values, unit of measure, or food group servings has changed. Keep careful notes of discrepancies and make edits to the food name later, if desired, for consistency with previous use in your state.

Serious conflicts can occur if you didn't leave a generous gap between the federal food IDs and your original state food IDs.

Carefully verify the contents of your Foods database before distributing it out to your units. You will want to provide your units with specific items to check (such as the last state item food ID and name), so that they can verify they have the correct version of the Foods database installed.
If importing individual files, the unit level could accidently import an older version of their V 3.x foods.dbf file, because packing the V 3.x databases is done in the conversion process and assigns "old" V 3.x files the current date. Any file you send out on diskette will have an older date than one that has just been packed.

Add New State Foods in SRS, under Tables, "by Food ID"

The SRS program defaults to a starting Food ID of 90,000 for State-added foods. If you had added foods with a lower starting number this will not automatically prompt the next available number in your existing series. You can either begin adding new foods with the suggested starting ID of 90,000 or you will have to manually edit the prompted Food ID number to fit with your existing series.

Exercise 4. Add a new food to the foods database.

You need to attach the Training DataDB--TRAINSRS and TableDB--TRAINTBL. They should have been created in the Basic SRS part of the training manual, Exercise 1, "Prepare SRS4 by Importing ERS Training Data".

From Main Switchboard, check you are in TrainSRS DataDB, TrainTBL TableDB
1. Click on Tables
2. Click on Foods Database, "By Food ID"
3. Add Food Item, it prompts with 90,000 or the next available ID, if state-added foods are above 90,000 already. You can manually Edit the ID if you need to.
   Accept the prompted ID and click on Next to continue.

This brings up the Edit Food Item screen, with a prompt of _New in the Food Name field.

Food Name, type in		CAULIFLOWER W/CHEESE SAUCE
Name of Unit, type in		CUP
Grams/Unit,	284	
Serving Size	.50	
Meat Servings		0
Dairy/Calcium Servings	.73	
Vegetable Servings		2.0
Bread Servings		0
Fruit Servings	0	
Other	2.75	
Calories	272	
Protein (g)		9.6
Fat (g)	12.4	
Carbohydrates (g)		23.2
Fiber (g)	3.0	
Alcohol (g)		0
Vitamin A (RE)	458	
Vitamin C (mg)	78	
Calcium (mg)	166	
Iron (mg)	1	

Vitamin B6 (mg) 0

Save is automatically highlighted, press Enter to save item
The next available Food ID is displayed. We aren't going to add any other foods at this time, so press ALT+C or click on Close to return to the Foods by ID browse screen
Press CTRL+END to go to the bottom of the list, your new food should be the last one.

Exercise 5. Edit the new food.
From the SRS Main Switchboard,
1. Click on Tables
2. Click on Foods Database, "By Food Name"
3. Type L to move cursor to the locator box, then type CAU and press Enter to jump to CAULIFLOWER in the foods database. Our entry will be the first one because it doesn't have a comma after CAULIFLOWER. Since we would rather have it in correct alphabetical order, we will edit the entry.
4. Click on the Explode button for CAULIFLOWER W/CHEESE SAUCE
5. Click in the Food Name box after the word CAULIFLOWER
6. add a comma after the word CAULIFLOWER--CAULIFLOWER, W/CHEESE SAUCE
7. type ALT+S to save the edit, the browse list doesn't change until you exit and re-enter it
8. ESC, then pick By Food Name
9. Type L to move cursor to the locator box, then type CAU and press Enter to jump to CAULIFLOWER in the foods database. With the comma, our entry is now the last one.

Press ESC twice to go back to the Main Switchboard.

As you can see, it is important to pay attention to the details in naming a food item. Follow the established pattern of commas and abbreviations if you want to maintain alphabetical integrity. It is best to avoid deleting foods from the database, if recalls exist that are still using them. If Paraprofessionals code foods, you can remove the item from their coding list and instruct PPs not to use it, then wait until the next reporting year to delete it from the foods database.

Use of ERS "Freeze Recalls" and "ReCalculate Recalls" need your state guidance
Freezing recalls can be used to recover hard disk space, but also to tie their analysis to the old version of the foods database before changing it.
ReCalculate Recalls would be used after a change in the foods database to have all unfrozen recalls evaluated with the new foods database nutrient analysis definitions.

You will want to carefully evaluate what has changed in a new release of the federal foods database, especially where items were deleted, to determine what conversion strategy you want to use in your state. Recalls that used items that were deleted can't yield accurate results. However, improvements in accuracy due to corrections in the new foods database may outweigh inaccuracies from those affected by deleted items. It really is a judgement call.

RACE CODES AND SUBCODES

The **new** installation of both SRS & ERS gives only the required 5 main race codes. If your state chooses to collect race subcodes, the CD contains a set of 31 Race codes & subcodes in the \OTHER\RACESUBS\races.dbf file, which you are asked to standardize on so that federal can aggregate them. If your state uses subcodes, you will need to export the races.dbf file to your units (see Exercise 6). It is very important that all units import and use race subcodes with a uniform definition. If your ERS Version 3.x race subcodes match the new definitions exactly, and you don't want to add any others, you could import your old races.dbf to SRS and redistribute it to your ERS units.

If a Race subcode was not imported by an ERS unit, their clients will not be shown as members of the subcode on their Adult, Youth, and Staff summary reports and the State summary report totals for all units will be off in the corresponding reports. This can distort your data and it is not easy to correct because when a race subcode was not available, the main race code would have been entered on each individual Adult, Youth, or Staff record.

How to Modify the SRS Race Code Table

From the SRS Main Switchboard, click on Tables, then Race Code Table
At this SRS Race Code Table browse screen, you can:

- **Add** a subcode by clicking on the **Add Race Code** button, entering the Race Code, Racial Group, clicking on Add, and then clicking on Done
- **Edit** a subcode Racial Group by clicking on the Explode button [...], edit, then click Save
- **Delete** a subcode by clicking on the button with the **red X**, and **typing Y to confirm** the deletion.
- **Print** print a complete list of subcodes with File, Print Screen, All, OK.

Race Code Sources

All versions of the races import file are called races.dbf. **The ERS4 CD contains both formats-- the ERS and SRS default with 5 main race codes (\OTHER\RACE5\races.dbf)** and the federal standard subcodes version with 31 codes and subcodes (\OTHER\RACESUBS\races.dbf). The list of federal standard Race subcodes is provided as Appendix 3, in the Basic SRS part of the Training Manual.

If your ERS 3.x races.dbf has subcodes that exactly correspond to the new listing definitions, you could import your old races.dbf file. **If you have been using a race subcode that is defined differently, your ERS units will need to edit the race codes of any clients or Paraprofessionals that conflict (**mainly continuing Adults**,** if converting at the start of a new reporting period**).** Volunteers, Youth Groups and Youth are all usually deleted when you "Start a New Reporting Period", any remaining Volunteers, Youth Groups and Youth that have race codes that conflict would also have to be edited.

Data Interchange, Race Codes, Import/Export

Import Click on the Import button under Race Codes**.** Browse to find the races.dbf file you want, it prompts with A:\races.dbf. Click on Import to start the process. Your existing file is replaced with the imported one. "Import complete. OK" message ends import.

Export Click on the Export button under Race Codes. Browse to find the destination you want, it prompts with A:\. Click on Export to start the process.

Exercise 6. Explore the Impact of State Customization.

Make a state modification in SRS, apply it in ERS and examine the impact of the customization back in SRS--an example adding a Race subcode.

a. Add a subcode to the Race Code Table in SRS.
b. Export the Race Code Table from SRS to disk for ERS.
c. Create an ERS TableDB and directory you can "play" in ERS.
d. Import the modified Race Code Table into an ERS TableDB attached with the Training DataDB.
e. Export the Adult, Youth and Staff summary reports to disk for SRS.
f. Import the modified summary reports into SRS.
g. Preview the race code section of a modified summary report to see how subcodes look on the state summary reports.

Exercise 6a. Add a subcode to the Race Code Table in SRS

1. In SRS, on the main switchboard, verify that the desired DataDB and TableDB are attached (for this Exercise TRAINSRS and TRAINTBL) and note Reporting Period Begin and End Dates.
2. click on Tables, then Race Code Table
3. Click on Add Race Code
4. Refer to federal list of Race Subcodes (in SRS part, Appendix 3) and type in the information for the desired subcode. For our exercise,
   Type in **2-04** for Race Code
   Type in **Haitian** for Racial Group
5. Click on Add and your new subcode will appear in the list
6. if finished adding subcodes, click on Done and ESC twice to go to the Main Switchboard

Exercise 6b. Export the Race Code Table from SRS to disk for ERS

1. Click on Data Interchange, then the Race Codes "Export" button
2. Default prompt is to a diskette in drive A:, insert a blank formatted disk (or one you want to add this file to) in drive A: or select a different destination.
3. Click on Export, you get an "Export completed successfully OK" message.
4. Click on OK, then ESC twice to get SRS Main Switchboard

The filename on the diskette is races.dbf. It is important to note on the diskette the contents of the race code table import file you have put there. The name races.dbf is used for all forms of the file--the 5 main race codes, the 31 codes and subcodes federal has established, or your state custom version.

ERS TableDB options

Option 1 - use your "Real" Tables TableDB and directory for this exercise
If you import this "Exercise" races.dbf into your real ERS Tables directory, you will later want to import a "Real" races.dbf file to replace the "Exercise" one with the correct contents.
Option 2 - RECOMMENDED - create and use a "play" ERS TableDB and directory for this exercise, TRAINTBL. The steps to create a "play" TableDB in ERS parallel those in Basic SRS Exercise 2.

Exercise 6c. Create a TableDB and Directory where you can "Play" in ERS

1. In ERS, go to System Administration, DataDB & TableDB, Maintain
2. use File Manager button to create a new **TRAINTBL** directory under C:\ERS4
   a) locate the C:\ERS4 directory and click on it to select it
   BE CAREFUL!, the default highlighted directory is often NOT ERS4
   b) click on File, Create Directory, type TRAINTBL, click OK
   c) double-click on the TABLES directory in the right side pane
   d) on the right side pane, click on erstbl40.mdb to select it
   e) on the menu, File, Copy
   f) type in C:\ERS4\TRAINTBL\ then click OK
   g) on the left side pane, drag down until you see TRAINTBL and double click to open it--the erstbl40.mdb file should appear there now
   h) click on File, Exit
3. then Add TableDB, name the "New DB Name" TRAINTBL to match your subdirectory name
4. Click on Next
5. Click on Browse, locate the TRAINTBL subdirectory under C:\ERS4\ and double click to select it, then click OK
6. Click on Save

Exercise 6d. Import the modified Race Code Table into an ERS TableDB attached with the Training DataDB

1. In ERS, on the main switchboard, verify that the desired DataDB and TableDB are attached (for this Exercise, TRAINING and TRAINTBL).
2. Click on Data Interchange, then the "Import Race Codes" button
3. Default prompt is to a diskette in drive A:, Browse to select if source is different.
4. Click on Import, you get an "Import complete OK" message.
5. Click on OK, then ESC to get ERS Data Interchange Switchboard

Exercise 6e. Export the Adult, Youth and Staff summary reports to disk for SRS (now include Race subcodes)

1. In ERS, at the Data Interchange Switchboard, click on Export Summary Reports
2. If you previously exported all the summary reports and have now only added a racc table with subcodes, you would un-check those reports you don't want to generate and export.

Click on the respective "Do Export" box to un-check: Diet Summary, Behavior Checklist Summary, Perinatal Projects Summary, Interagency Coop. These summary reports do not involve Race codes and you can save time by skipping them if they are not needed for some other reason. **Don't check the "Do Report" box for any of the four Adult summary reports unless you want a printed summary report for each defined filter**.

3. Verify that the Report Period dates match the SRS reporting year dates
4. Default prompt is to a diskette in drive A:, insert a blank formatted disk (or one you want to add these summary reports to) in drive A: or select a different destination.
5. Click on Export, you get a "Preparing EXPSUM40.MDB" message. It exports each summary report you had checked, including a version for each defined filter on adult reports. You get a "Export to A:\EXPSUM40.MDB completed successfully OK" message.
6. Click on OK, then ESC twice to get ERS Main Switchboard

Exercise 6f. Import the modified summary reports into SRS

1. In SRS, on the main switchboard, verify that the desired DataDB and TableDB are attached (for this Exercise TRAINSRS and TRAINTBL).
2. Click on Import Status, then the Import Summary Data button
3. Default prompt is to a diskette in drive A:, insert your disk with the exported ERS summary files in drive A: or Browse to select a different source.
4. Click on Next
5. Click on Import. It imports each summary report you had checked, then you get an "Import from A:\EXPSUM40.MDB completed successfully OK" message.
6. Click on OK, then click on the Exit Door button twice to get the SRS Main Switchboard.

Exercise 6g. Preview the Race code section of a modified summary report

1. Click on Reports, then Adult Summary
2. Click on Next to generate state level summary for all imported units
3. Click on Preview, then click on the forward arrow to go to p. 2
4. If the race subcode was in the summary reports imported from ERS4, it should show up in the category labels under 7) Gender and racial/ethnic characteristics, followed by a horizontal line located above the indented main code "Total". You will also see a new line "Not assigned to a racial sub code" indicating that the main code 2-00 had been entered for those clients, located above the indented main code "Total".

White Total
Haitian
Not assigned to a racial sub code

Black Total

Table of Contents - Unit Level Basic Set Up

OVERVIEW

This series of videos is designed to introduce you to the new Windows version of the EFNEP Evaluation/Reporting software, known as ERS4. The focus will be on how to use the software. Your state may be changing the way it uses ERS—beginning to use Nutrition Method 1 or the Behavior Checklist—or adopting some of the new components. Follow the guidance of your state office on which components you will use and what steps to follow in setting up your ERS4 installation.

In the videos, we are demonstrating ERS using Windows 95 on a Pentium 200 MHZ computer with 32 MB of RAM and a 4.0 GB hard drive, with about 2 GB empty, using the Training DataDB and the TableDB from a new installation. Tasks may take more or less time on your computer, depending on it's processor speed, RAM memory, and available hard disk space. A Pentium computer is recommended. The ERS Volume 1 User's Manual shows screens and provides tips for using the ERS4 program on a Windows 3.1 or 3.11 system. The appearance of screens, steps to accomplish some tasks, and available utility programs vary slightly with differences in the Windows operating system.

The EFNEP Evaluation/Reporting System has 3 levels of summarization and data flows sequentially from FRS (federal) to SRS (state) to ERS (local unit) from the top down and back again. The federal FRS program provides files that are used to set up the state level SRS program. Each state makes decisions about how they will use the SRS/ERS program, which optional components they will collect. A State may customize their SRS setup and export files to diskette that are then sent out and used to set up the local unit level ERS program in each county. The ERS Unit Level Supervisors video explores decisions regarding optional components and other matters that can be made at the unit level.

The data entered at the local unit level is the key to ERS4. Getting it set up the first time may seem complicated, but most steps only need to be done once. The manuals, on-line help system, and the ERS4 web site provide a wealth of detailed information, to help you use the system. You will discover that the program is quite flexible in the combinations of components and features you can use. It is also quite forgiving, warning when dates are out of an expected range, allowing you to cancel and start over when adding or editing. If you import an incorrect file, you can recover by just importing the correct one. For those who like to keep their hands on the keyboard, there are key combinations for many of the mouse functions on Browse Screens and Forms.

ERS4 CD

The ERS4 program has been distributed to states on CD-ROM only. Your state may distribute the program to you on CD or on diskettes. From the CD, you can preview or print the documentation using the Adobe Acrobat Reader 3.01, which is provided. Acrobat files are .pdf type and their graphics print best on a Postscript printer. Volume 1 of the ERS manual is also provided on the CD in Microsoft Word 7.0 format (MS Office 95 version). Note that Word97 (MS Office 97 version) may not number chapters correctly. This Training Manual is not on the distributed CD. You can download Training Manual files, updates, & useful tips from the ERS4 Web Site (ERS4 web site at **http://www.reeusda.gov/ers4/home.htm**).

ERS4 Web Site

http://www.reeusda.gov/ers4/home.htm)

An example data set has been provided on the CD as ERS4\TRAINING\ERSDAT40.ZIP for use as a training tool. In Exercises 7 & 7a, you will use ERS Tools, Restore, to bring it into a directory on your hard drive for use. It contains a bit of all the new elements, so you can explore them and see what they are like. For a description, see Appendix 1, "Contents of the Training Data Set."

Viewing the ERS4 User's Manuals with Acrobat

At the table of contents for the CD-ROM (see Appendix 2, "ERS4 CD-ROM"), you will want to install the Acrobat Reader prior to trying to view the manuals located on the CD-ROM on your computer monitor and/or print them for future reference. To read the ERS Manuals you must have Acrobat Reader 3.01 or higher on your computer. When you have finished installing Acrobat Reader, you will need to click on "readme.exe" again to get the CD Table of Contents. Click on the "View ERS Manuals" button to reach a four page document which includes a listing of the three volumes and the documents included in Volumes 2 and 3. Making a copy of these four pages can be a good reference to know the reports and documents included in Volumes 2 and 3 respectively. The User documentation for the ERS system is in three separate volumes.

The tool bar at the top of the Acrobat Reader screen includes the navigation buttons:

- double left arrows take you back to the previous screen
- single left arrow takes you back one page
- single left arrow with line to the left takes you back to the beginning of this document
- single right arrow takes you ahead one page
- single right arrow with line to the right takes you to the end of the document

Other Acrobat Reader features which you might find helpful include the magnifying glass on the tool bar. Clicking it on the screen enlarges that portion of the screen. Every click makes the screen image larger. You can use one of the three "page" icons on the right end of the tool bar to bring the page back to 100%, to fit the page, or to make the magnified section fit the width of the page. You can use the "hand" tool to drag the page around and view different parts of it, much like moving a piece of paper around on your desk. This is helpful when the view is magnified.

Contents of the EFNEP Evaluation/Reporting System User's Guide

Volume 1: Software User's Manual is organized into 17 chapters to guide the user through installation and use of the software. Clicking on Volume 1, you are at the title page. The red box in the upper left corner takes you back to the initial selection screen. Clicking in the box in the lower left corner with the number of pages gives you a Go to Page selection box, you enter the page number you want to go to. If you type in "13" and click on "OK" button, it takes you to the Table of Contents for Volume 1. By clicking in the blue box around each chapter title, you can go directly to that chapter. When finished viewing contents of a chapter, you can click in the lower left Go to Page box and enter 13 to return to the Table of Contents for the volume. To return to the selection page for the three volumes of the ERS User's Manual use the left arrow with line and then click in the red box.

Chapter 1 provides a basic overview of the system and its features, and highlight differences from preceding versions.

Chapter 2 shows how to run the system, including the suggested sequence of initial data entry for a new database. It also provides a description of the types of screens used by the system, some symbols used, some basic Windows terms, and some keyboard and mouse tips.

Chapters 3 - 15 describe the components and functions performed by the ERS system, including the ERS Tools application.

Chapter 16 describes the installation of the system.

Chapter 17, Reference, describes the look up tables and codes used by the system which appear as drop down lists on the various data entry screens. They are organized alphabetically by the label of the data entry field, regardless of which data entry screen they pertain to.

The first two chapters of the EFNEP Evaluation/Reporting System User's Guide, Volume 1: Software User's Manual provide important background. Please familiarize yourself with them, especially the contents of Tables 1-2, 2-2 and the keyboard and mouse tips on p. 21.

Volume 2: Sample Reports, contains samples of the reports that may be prepared with this system. By clicking on Volume 2, you have a table with a complete listing of the reports which can be produced in the ERS System. Clicking on any of the report titles gives you a sample of the reports using the "training" data. These reports can be printed using "file/print" on the tool bar. If you are off page 1 of the document, use the "left arrow with line" to return to the beginning. Then use the "red box" to return to the selection screen.

Volume 3: Guidelines and Background Documentation, provides background documentation and describes the policies and procedures formulated by USDA headquarters for clarity and consistency in input and analysis. Clicking on Volume 3, you get a table with a complete listing of all the individual documents in this volume. Clicking on any of the document titles accesses the document which can be printed under "file/print" on the tool bar. Click on the "red box" to go back to the listing for Volume 3 and use the left arrow with line to return to the start document. Click on File, then Exit or press ALT-F4 to close the Acrobat Reader program.

ERS Main Switchboard

ERS4 system uses a Main Switchboard as the point of departure for working with the program. The Main Switchboard has a series of buttons which access the various features or modules of the program through other switchboards. The buttons down the right side control functions which are most often used at the beginning of the reporting year to import needed databases and program updates and again at the end of the year to export the unit data to the SRS system. The buttons down the left side plus the first two in the middle of the switchboard are used for the day to day data entry of clients and staff into the database. The Main Switchboard has an "information box" which tells the Unit, the DataDB and TableDB attached, today's date, the Reporting Period for the unit, and which user is logged on. This box will have added significance as you begin to work with the ERS4 system.

The data entry switchboards such as "Adults" are organized with the data entry buttons down the left side and the buttons which generate reports/outputs are down the right side.

Help is available at every level by using the F1 function key. (Press F1). The "Help" screen includes other links. Use the "ESC" key to exit from the Help screen.

Finding ERS 3.x functions in ERS4

Users of earlier versions of the ERS program will find the same components that were in the DOS program (Adults, Nutrition, Checklist, Youth, Staff, & Tables), now located on switchboard buttons instead of under menus. Interagency Cooperation is a separate button, updated at year-end. Some "File" functions have been moved to a separate "ERS Tools" database maintenance program while the rest are found under "System Administration". Data Interchange includes familiar "Export" to 4-H and SRS functions, as well as imports for Additional Behavior Checklist Question Sets, Subgroups & Filters, Foods Database, Race Codes, and ERS Version 3.x Data or Tables.

Buttons on the Main Switchboard

As a way of acquainting you with the various features of the ERS4 program and where they are located, let's highlight the features and components of each switchboard: (new features are flagged with an *)

Adults manages the data on the adult clients in the database. You can add new adults to the data, modify existing participants's information and summarize the current status through reports. A new feature in this area is Adult ID Ranges* which lets you assign a group of client ID's to a specific paraprofessional or client group.

Nutrition manages the three nutritional methods and includes the federal foods database with the nutrient and food group information for 1523 foods. The nutrient and/or food group content of client diets are used to print impact reports on dietary improvements.

Checklists manages the 10 question base set and any additional question sets* customized by your state to meet the needs of special audiences. The Behavior Checklist is optional, but ALL of the basic 10 questions must be collected, if you are using it. The base checklist looks at clients improvement in areas which can not be measured by the food recall, such as food resource management, nutrition practices and food handling and safety. Additional Questions gives your state the opportunity to enhance the 10 base questions to include others. The State level SRS program creates Additional Question Sets which can be used at the unit level for specific purposes or audiences.

A single "Additional" Question Set is limited to a maximum of 15 questions, (that's in addition to the basic 10 that you must ask all clients). You may have several "Additional" Question Sets to use at the unit level, tailored for different audiences. A particular client can only have data entered for one "Additional" Question Set, and both Entry and Exit must be entered before the record will be included on the Checklist Summary Report. The Checklist is further addressed on the ERS Daily Use - Optional Components video.

Staff manages the demographics, staff reports and hours worked for the three levels of staff...the professionals*, paraprofessionals, and volunteers who deliver the program.

Youth maintains information and provides reports on the youth groups, with the option to keep records on the individual youth enrolled in a group. The left side of the screen is for data entry and the right side of screen is for creating reports. A feature under the youth switchboard is the Impact Indicators from the PPARs system.

The four PPARs indicators are:
1) Eats a variety of foods
2) Increased knowledge of the essentials of human nutrition
3) Increased ability to select low-cost, nutritious foods
4) Improved practices in food preparation and safety

These indicators can be used to generate impact summaries for your partners and volunteer leaders who work with youth groups.

Interagency Cooperation records data addressing interagency cooperation with two major food assistance programs (Food Stamps and WIC), coalitions and agreements, and captures data on the source and amount of outside funds.

* **Subgroups** (**& Filters**) permit data for adults involved in a variety of programs, initiatives, or projects to be stored in the same database and to be retrieved independently through the use of subgroup codes and filters. They apply only to adults and are new in ERS4. Filters are a way of pulling a subset of data for reports. Subgroups are used to identify groups that can't be defined with the existing Adult data fields, by assigning member clients a unique subgroup code. Once adult records have been tagged with a subgroup code, a filter can use that code to pull out the data for the subgroup and print custom reports.

Filters can be for just a subgroup code (ex. E = Sample), or for some combination of fields already being entered for Adults (ex. Pregnant and Under Age 20), or both (In the Sample group (E), Pregnant, and Under Age 20). Filters can be applied to any of the adult summary reports to customize impact statements, as well as to the PP List of Families, and Mailing Labels. Together, filters and subgroups provide a powerful tool for exploring your data. They have lots of possibilities for giving customized feedback to cooperators and stakeholders. Subgroups & Filters are discussed further on the ERS -Advanced video and in the related portion of the training manual.

The Training data set includes examples of filters from all levels--federal, state and local unit. Units can have up to 4 subgroup codes (W-Z), States can have up to 10 subgroup codes. Subgroups and filters must be created at the state or federal level for the SRS program to use them in data summaries of multiple units. You can edit unit level subgroups and filters, create new ones and delete existing ones. In the ERS - Advanced, you will create a unit level subgroup and a filter to pull its data, then edit the Nursnobaby filter to correct an error.

* **Perinatal Projects** maintains prenatal, birth, and infant feeding information for pregnant and nursing females and is designed to meet the needs of special programs focused on pregnant women and the birth of a healthy baby. Data can be collected for prenatal, breastfeeding, or both.

  Perinatal is a completely new, optional component oriented toward programs where a long-term commitment is possible (throughout pregnancy and/or a year or more of breastfeeding and introducing new foods). For a record to be included in the Prenatal Summary report, you must have entered the Date of Birth and birth outcome information, and the DOB must fall within the Reporting Period. For a record to be included the main part of the Breastfeeding Summary, you must have entered a DOB for all babies being followed and an End Record Date within the Reporting Period. A count of clients who initiated Breastfeeding but do not yet have an End Record Date is included in the Breastfeeding Summary. There is a Perinatal Review Report that lists the data that has been entered for the clients being followed for Prenatal or for Breastfeeding. Clients must be entered in the Adult screen before Perinatal data can be entered. Perinatal components are further addressed on the ERS Daily Use - Optional Components video.

  Tables is used to view and update the four tables which the system uses. When you install ERS4, these are the federal tables which install:

  - the Race Codes Table with the five base codes;
  - the RDA Table with recommended dietary allowances for 26 different combinations of age and sex; minimum recommended servings, and poverty level tables.
  - the Minimum Servings Table with minimum food group servings for seven different combinations of sex, age and pregnant or nursing.
  - the Poverty Guidelines Table with income ranges for households of 1 - 27. This table is updated annually.

* **System Administration** is used to perform the administrative and housekeeping functions for the unit.

* **DataDB and TableDB** - analogous to View/Update Data directories in version 3.x, this switchboard associates database files in various directories with ERS4 names for them and "Attaches" the "current" DataDB and TableDB. A continuing feature is that this system allows multiple sets of data on a single PC with each located in a separate directory. For a given year, one TableDB can be associated with several DataDBs. The changes in the Poverty Guidelines from year to year will require a different TableDB each year.

* **Security** is a new feature under this switchboard is which protects the privacy of your clients by restricting access to their data. You must logon with a User Name and Password on both the main program (ERS), and the auxiliary program (ERS Tools). Default logon Name: ERS and Password: ERS (all capitals).

System Configuration is where you define the reporting unit which defines the contents of the "information box" on the Main Switchboard. Additionally, it controls the ability to update the tables and foods database through an "enables" function.

* **Data Interchange** is used at the beginning of the year to import Tables and the database files needed to operate ERS4; and at the end of the year to export the summary reports to SRS for the state level to prepare reports for submission to federal. The "Import" function for Question Sets and Subgroups & Filters can be accomplished here or under the respective switchboards. The "Import Foods Database" and "Import Race Codes" must be done under the Data Interchange Switchboard. New features under the Data Interchange include:

* **Export to dBase III** exports data in dBase III format which allows manipulation by other programs. File structures are NOT the same as ERS V3.3 or earlier.

* **Import V3 Tables** imports tables files from V 3.3 and V 3.1 of ERS. This function is used to bring prior years' Tables into ERS4.

* **Import V3 Data** imports data files from V 3.3 and V 3.1 of ERS. This feature is used to bring prior years' Data files into ERS4. Checklist data must be V3.3 to be imported to ERS4.

* **Notebook Feature** is a new feature on the Data Interchange Switchboard. It allows a copy of the database to be taken to second computer, usually a notebook, so that data can be added independently, and then merged back into the "master" database later (at least monthly). This can also be used at year-end crunch time when you need to update data, if you do not have a network. Taking a copy to a second machine in the office can allow two people to add or edit records in the same DataDB at the same time. If you use it this way, you must merge and then re-copy the Database on a daily basis. Deletes are retained only if done on the MasterDB computer when no CopyDB exists.

* **ERS4 is Network-ready**. This allows you to keep DataDB and TableDB files on a network server and update them from computers connected to the network (LAN), which have the ERS4 programs installed on their local hard disk. It operates slower than a stand-alone installation, but offers advantages when multiple people need access to the same data at the same time. Have your network administrator limit access to the network directory containing ERS4 data to ERS personnel only. Anyone with the Microsoft Office program can open the DataDB files using MS Access and might damage them (ex. by saving from a newer version than Access 2.0), if they can get to the network directory.

ERS Tools

* **ERS Tools** are a new feature and separate from the main ERS program. The Tools icon (an ambulance on a diskette) appears on Main Switchboard and closes main ERS program before opening Tools. The tools icon also appears in the ERS program group window. The Tools switchboard has Repair/Compact database functions (similar to "Pack" in ERS 3.x), that are applied separately to the ApplicationDB, DataDB(s), and TableDB. Backup, Restore, and Install Software Update (used for revisions to the ERS program itself) buttons are also on the Tools switchboard.

SETTING UP ERS4

Install ERS4 -- Steps to Accomplish:

A **new** installation of ERS4 based on the CD will install the 3/98 federal version of Subgroups, Filters, Foods Database and Tables (summarized in Appendix 3, "Contents of a NEW Install of ERS4"). Installation is discussed in chapter 16 of the ERS4 Volume 1: Software User's Manual. Network (LAN) installation information is found on p. 131. Be sure to read about the Important Files on p. 133. ERS4 is designed for Windows 3.x or Windows 95, *it will not run under Windows NT*. You are strongly advised against installing the ERS4 program on a computer that uses hard drive compression--it may cause extremely slow performance.

The infrequent steps to accomplish a basic ERS4 system setup are covered here, more complicated setups are addressed on the Advanced tape. There are three ERS "Daily Use" tapes: Adult, Youth, and Optional Components (includes Additional Nutrition Method 1 Information, Checklists, and Perinatal Projects). The "Daily Use" tapes go into the details of adding, editing, and deleting data and producing reports.

Exercise 1. New Install of ERS4 to C:\ERS4

You will follow the guidance of your state office on which components you will use and what steps to follow in setting up your ERS4 installation. These steps describe a **new** installation which creates an empty DataDB in the C:\ERS4\DATA directory with federal subgroups & filters, and installs the 3/98 federal tables files into C:\ERS4\TABLES. If you are doing a re-install, review the special considerations in Appendix 4, "Re-installation Option - Use Existing DataDB & TableDB" before starting.

From CD-ROM:

1. Insert ERS4 CD
2. Click on the "Install ERS" button.
   If your CD didn't automatically start and display the button list, look at the CD's drive contents with File Manager (Win 3.x) or My Computer or Explore (Win95) and double click on CD's Readme.exe file to open it.

From Diskettes:

1. Insert the first ERS4 Installation diskette in drive A: and
2. Windows 95 — Start, Run, type A:\SETUP.EXE and press Enter
   Windows 3.x — File, Run, type A:\SETUP.EXE and press Enter (in Program Manager)
3. Accept prompted path for installation to C:\ERS4

4. Pick NEW and follow the screen instructions. If you are installing from diskettes, the program prompts you to insert diskettes and press Enter to continue. Diskette 2 contains files common

to many Windows programs and will not prompt to be inserted on many systems because the files have already been installed.

5. Open the ERS program.
   a) Win 95 click on "Shortcut to ERS" icon on the desktop to open the ERS startup window
      Win 3.1, look in the ERS program group
   b) **Double-click the ERS icon to start the ERS4 program**.

   Other icons in the ERS window include:

ERS Help	icon, one way to access ERS4 Help system
ERS Tools	icon for Repair/Compact, Backup, Restore, Install Software Update
ScanDisk	icon for hard disk maintenance utility to be used when program crashes

   (Win 3.x must actually exit Windows and type `scandisk` at a DOS prompt to fix any errors that are found. If DOS is earlier than version 6.20, use the DOS `chkdsk /f` command)

6. Logon to the ERS4 program. At the Name box, type **ERS** in all capital letters, press TAB key to get to Password, then type **ERS** in all capital letters again.

Once you have determined that the main ERS program installed and opens correctly, it is time to install any revisions or updates that your state advises you to apply and to set up ERS for use within your unit by entering identifying information, reporting year dates, and Staff data. Appendix 5, "ERS4 Overview" provides a summary of the steps taken at the Start of the Reporting Year to set up your real data in ERS and the steps at the End of the Reporting Year task to finalize it and send it forward.

Revisions to the ERS4 Program or Tables files. If the federal or state office has modified files since the 3/98 ERS4 installation CD was created, you will need to install the appropriate updates before you begin using ERS. Your state will monitor the ERS4 web site, advise you on procedures to follow, and provide you with necessary diskettes. If no state customizations are involved, you may be instructed to download the federal files directly from the ERS4 web site. Appendix 6, "Examples of ERS4 Updates" shows two ways updates may be applied.

Individual File Imports are demonstrated and State Customization is explored further on the Unit Level Advanced tape. See the Unit Level Advanced Appendix 1, "Individual Import Files" for details.

When the update is to the ERS program itself, you will get either a SETUP.EXE or an ERSAPP40.ZIP file that is applied through the ERS Tools "Install Software Update" button. These options are discussed in Volume 1 of the ERS User's Manual, chapter 15--ERS Tools, p. 122.

Updates to tables files, additional behavior questions, or subgroups & filters may involve customization at the state level. These updates are discussed further on the Advanced ERS training videotape and in Volume 1 of the ERS User's Manual, chapter 13--Data Interchange Switchboard, p.101-104.

Working with the System
Let's look at what the system looks like with a new install. The "information box" on the Main Switchboard has unit ID XX000, a blank Unit Name, an empty DataDB in C:\ERS4\DATA, a TableDB in C:\ERS4\TABLES with the federal tables, and shows the federal fiscal year as the reporting year. The user is ERS.

If you click on "Adults," "Youth," or "Staff, you can verify that the DataDB is empty.
Adult, Adults by ID has no clients listed on the browse screen
Youth, Youth Groups by ID has no youth groups listed on the browse screen

Security Functions:

Located under System Administration, Security Functions allow an administrator to add and delete users, and allow users to change their password. There are two levels of permission for users: Executive and Data Entry.

- Data Entry users can not manage security, they can only change their own password. All users can add, edit or delete data in any component of the ERS program.
- Executive users manage security and must also have Data Entry permission.

The ERS account has both permissions and can manage security only because it has Executive permission. The "Manage Security" button is used to add users, delete users, clear their passwords and set their permission level. You must logon with a User Name and Password on both the main program (ERS), and the auxiliary program (ERS Tools). Default Name: ERS and Password: ERS (in all capitals).

You need to create a unique name and password for each user accessing the system. Passwords are case-sensitive, so it is recommended that you create user names and passwords using all lowercase letters (Caps Lock light should be off). You should delete the default ERS name and password once you have 2 local users w/Executive Permissions who are comfortable with their new logon name and password. Review the ERS User's Guide, Volume 1, p. 96 and Volume 3, Federal Guidance--Security Features for more details.

Exercise 2. Set up Security, Add Two Users with Executive Permission
Go to System Administration, Security Functions

1. Click on "Manage Security"
2. Click on "New User"
3. Type in a name for the new user in all lowercase letters (could be initials or a last name+first initial) and click on "OK". Write down what you entered, the password is identical to the name.
4. "User Created" screen will display the new user and the password created. Verify Name and Password are as you have written them down!
5. Click on "OK"

6. Indicate the permission level for the new user by clicking in the appropriate boxes (marks with an X to show permissions). We want to assign Executive permission, so click in **both** Data Entry and Executive boxes. For Data Entry permission, you would only check that box.

   "Clear Password" is to be used when a “User” has forgotten their password. It will allow this user to enter the system without using a password by pressing “ENTER”. Emphasize the users need to change the password and put a new one in!

7. When finished entering new users, click on the “Close” button.

Each person should logon to ERS4 with their new Name and immediately go to System Administration, Security Functions, Change Password and change their password to something more secure. It should be something that they can remember without writing it down anywhere. **Important:** Passwords are case sensitive, use lowercase letters. Avoid easy to guess passwords, they are significant security risks.

The goal is to stop using ERS as an access, and delete both the ERS Name and Password from your system as soon as users are comfortable with their own logon names & passwords.

To Delete a User Name:

Go to System Administration, Security Functions
1. Click on “Manage Security.”
2. Use the “Name” drop-down screen to highlight the user to be deleted.
3. When the name appears in the box, click on the “delete” key..
4. "Confirm User Deletion" box appears, clicking on "OK" deleted the user.

System Configuration

System Configuration is used to identify the site and select configuration options. The information provided includes identification of the unit, the reporting period, the default nutritional method, and update options. Because these settings directly affect the ability of SRS to use the data you export, the state office determines most of them. Discuss any changes with your state office before you start entering data.

Exercise 3. Set up the System Configuration for your unit in the Data directory, using codes and dates specified by your state

Unit ID: The Unit ID consists of the two letter State abbreviation and the 3 digit FIPS code for the county (Federal Information Processing Standards Publication Code).

Sub Unit: The Sub Unit code can be used to distinguish between different computers or sites within the county where ERS is installed and used independently (have same Unit ID and do not use the Notebook Feature). Sub Unit codes can help identify units as Adult (A), 4-H (4H), or Both (B). They can be used to identify laptops within a unit by number (A1, A2, A3...).

Unit Name: Use the unit's County/City name as the unit name. Your state office will recommend a naming convention to be followed. It is helpful to indicate Adult only or 4-H only as part of the unit name. If Sampling, the sampling rate is helpful. The Unit Name will appear on the reports and identifies the unit to the state SRS program.

Period Begin and End: The Report period is used to specify the time period of the active data. Usually the federal or state fiscal year is used as the report period but it may be a different **12-month period**. These dates become the default dates for report and export date ranges. Note that the Training data Report Period was longer than 12 months, that is **not** representative of normal practice.

The default DATA directory in both new ERS and SRS installations prompts as:

Unit ID	XX000
Period Begin	01-Oct-1997
Period End	30-Sep-1998

The Reporting Year must be set to fit the DataDB being used. If you import your data from ERS V3, the unit name and dates will be those from version 3.x.

Default Nutrition Method: When the first recall is entered for a new client, this is the nutrition method which will be prompted. Nutrition Method: 1 = Computerized Analysis
2 = Food Group Servings
3 = External Analysis

Allow Updates of Foods DB: Enable updates to the Foods database only while you are making required changes. It is best to keep the updating option disabled to avoid accidental updating when viewing the foods database.

Allow Updates of Tables: Enable updates to the tables only while you are making required changes. This switch controls the following tables: RDA, Minimum Servings, Poverty Guidelines. It is best to keep the updating option disabled to avoid accidental updating when viewing the tables.

Use the "Save" button to retain any changes made in the System Configuration.

Poverty Guidelines Table:

The Poverty Guidelines table provides the poverty level expressed in annual income for each family size. The poverty level guidelines are usually updated annually usually around March, and can be found on the **ERS4 WEB site http://www.reeusda.gov/ers4/home.htm** or at the http://aspe.os.dhhs.gov/poverty/98poverty.htm (for the different years change 98 to 99, etc).

From the Main Switchboard, click on Tables then click on "Poverty Guidelines" to view the entries for family sizes from 1 to 27. ERS4 installs the FY97 Poverty Guidelines, you will need to update the Poverty Guidelines Table each year. Verify the correct figures for the current FY for your state and update it now in Exercise 4.

Exercise 4. Update the Poverty Guidelines Table

1. Go into System Administration, System Configuration and put an "X" after "Allow Update of Tables". "Save" this change and return to the Main Switchboard.

2. Click on Tables, Poverty Guidelines, to display a listing of the current Poverty guidelines values with two new buttons: "Add Entry" and "Generate."

3. Click on the "Generate" button which asks for the "poverty guideline amount for a family size of 1" and the "amount for each additional member".

4. If you live in the contiguous 48 states or Washington, DC, the FY98 Poverty Guideline value for a Family Size of 1 is $8050, and Amount for each Additional Member = $2,800 (Enter the current values supplied by your state office).

5. After entering this information, click on the "Generate" button to create the entire new Poverty Guidelines table. Verify that you entered the correct values. It is easy to click on “Generate” and enter corrected values, if needed.

6. Remember to return to System Administration, System Configuration and click (or press space bar) to remove the "X" after "Allow Update of Tables". "Save" this change and return to the Main Switchboard.

This is a much more accurate way to make the changes than trying to type in all 27 different values.

Creating and Attaching DataDBs

As we discussed earlier, ERS4 installs an empty DataDB for you to enter your clients and staff. Since we want you to have some experiences with the various data entry and output functions of the system, we have included a training data set on the CD-ROM, which you will be referred to throughout the Training tapes for exercises and as a safe place to "play" with the program. To be able to use it we must create and attach a new DataDB.

Creating New DataDBs and TableDBs:
From the Main Switchboard, pick System Administration, then DataDB & TableDB. This lists Available DataDBs and TableDBs and has buttons to Attach or Maintain. The “Maintain” function keeps track of links, it associates the ERS name for the DataDB or TableDB with its directory path--the actual location in your hard disk directory structure. It is selected to add, change or delete the associated location of DBs.

Exercise 5. Create C:\ERS4\TRAINING Directory and DataDB

From the Main Switchboard, pick System Administration, then DataDB & TableDB.

1. Click on the “Maintain” button to display the existing DataDBs and TableDBs.

2. If the desired directories are not in place, use the Windows File Manager button to create directories to hold the new DataDB or Table DB. This step has to be done before you can create a new DB.

    a) Locate and highlight the ERS4 directory by double clicking on it. It would normally be on the C drive.

    b) Click on “File”, then “Create Directory” which will prompt for a “Name”.

    c) Type in the name you want for this new directory. We are going to indicate “Training”.

    d) Clicking on the “OK” will add the directory, c:\ers4\training.

e) Exit the File Manager and return to the "Maintain DataDB and TableDB".

3. Click on the "Add DataDB" button.

4. Type in the new DB name: "Training" and click on the "Next" button.

5. Use the "Browse" button to locate the path for "Training".

6. Double click on the file name and make sure the full path is displayed before proceeding.

7. Click on "OK" and the new directory will display along with the path identified.

8. Click on the "Save" button to add the new DataDB to the listing.
   From this screen, DataDBs and TableDBs can be edited and/or deleted.

9. Use the "Exit" door or press ESC to return to the "Attach DataDB and TableDB" screen.

10. Click on "Training" to select it and then click on the "Attach" button. A "New DataDB/TableDB" message box appears listing the directory path you are trying to attach.

    DataDB = C:\ERS4\TRAINING\ERSDAT40.MDB
    The DataDB or TableDB identified above does not exist or cannot be accessed.
    Click CREATE to create it (This is usually what you want to do).
    Click CANCEL to try some other location.
    The system cannot operate without a good DataDB and a good TableDB
    Create **Cancel**

11. We will click on "Create" because we are trying to create a new DataDB. A Message "Attaching DataDB & TableDB" with a progress bar appears, and eventually you are returned to the ERS Main Switchboard. The Main Switchboard information box will confirm that you now have associated an empty DataDB called "Training" with the directory path c:\ers4\training, and you can start entering data.

Additional Exercise for Users of SRS, the State level program:

SRS Exercise 5a. Create C:\ERS4\Train1 Directory and DataDB
Create C:\ERS4\Train2 Directory and DataDB

From the Main Switchboard, pick System Administration, then DataDB & TableDB. Repeat steps in Exercise 5 above to create and name two other directories to hold ERS Training data, called TRAIN1 and TRAIN2. Attach each one, in turn, to create the DataDB.

Summary Data will be exported from each of the 3 ERS4 directories C:\ERS4\TRAINING, TRAIN1, & TRAIN2 for use with the SRS state level program. At that time, you will have 3 separate diskettes, each with the file EXPSUM40.MDB on it. (Exercises 9 & 9a)

C:\ERS4\TRAINING	FL999 Example Database
C:\ERS4\TRAIN1	FL000 TRAINING 1
C:\ERS4\TRAIN2	FL888 TRAINING 2

Attaching a Different DataDB:

Use the “Attach” function to make a different data set active. The “Attach” function may be done numerous times during the course of working with ERS4. The databases may be in the same or different directories. Each time you Attach, the Main Switchboard Information box changes to show the current DataDB and TableDB.

1. To “Attach” an existing DataDB or TableDB, highlight the desired files.

2. They should appear in the “Selected” section at the bottom of the screen.

3. Click on the “Attach” button to make these the active DataDB and Table DB.

4. You are returned to the Main Switchboard and the new DataDB and Table DB are displayed.

It is desirable to have the relevant FY identified as part of the directory and DB name.

Exercise 6. Rename the Data directory to DATA98 & add name
Rename the Tables directory to TABLES98 & add name

From the Main Switchboard, pick System Administration, DataDB & TableDB, then Maintain.

1. Click on File Manager button

2. Double-click on the Data folder under C:\ERS4 to select it.

3. Click on File Rename, enter DATA98 in the TO: box, and click on OK.

4. Double-click on the Tables folder under C:\ERS4 to select it.

5. Click on File Rename, enter TABLES98 in the TO: box, and click on OK.

6. ALT-F-X to exit from File Manager

7. Click on "Add DataDB" to associate new DataDB name DATA98 with the directory DATA98
   a) enter DATA98, click on Next
   b) Browse to locate DATA98 folder under c:\ERS4, double-click to select it, then Save

8. Click on "Add DataDB" to associate new TableDB name TABLES98 with the directory TABLES98
   a) enter Table, click on Next
   b) Browse to locate Table folder under c:\ERS4, double-click to select it, then Save

9. ESC to Attach DataDB & TableDB screen.

10. Click to select DATA98 and TABLES98, then click on Attach button to Attach them.

Troubleshooting if Attach Fails:

You may encounter a "Severe Error Failed to Attach Data and Tables Directories" message, if something has gone wrong with the path to your DataDB, with the DataDB, or with ERS4 itself.

If you are attempting to Attach a DataDB over a network and you get the warning, "Severe Error Failed to Attach Data and Tables Directories," it is likely that the problem is with your network connection. Select "Click CANCEL to try some other location." See if you can Attach a DataDB on your local hard drive. Check that the computer containing the file that failed to Attach is turned on and accessible over the network, outside of ERS. If the network connection seems fine outside of ERS, you may still need to reboot your computer before your ERS program will see the DataDB over the network.

Another cause of this message is when the name or path to the directory on the hard disk was changed, but not ERS4 links or references to it.

If neither of the first two explanations solves your problem, it may be that the AppDB or the DataDB itself has become corrupt. If other DataDBs appear to Attach and work correctly, the problem is most likely with the DataDB, rather than in the AppDB.

Run ScanDisk. You must close Win 3.x to a DOS prompt to run ScanDisk (or Chkdsk /f, if your system doesn't have ScanDisk). Then try attaching the DataDB again. If no DataDBs are Attaching after running ScanDisk, you may have a problem with the AppDB. If you are having a problem with one or more DataDBs, open ERS Tools (see below). Run Repair/Compact AppDB if more than one DataDB seems to be having problems.

In order for ERS Tools to Repair/Compact a DataDB, it must be displayed in the information box at the top of the screen. Use Change DataDB/TableDB to make the one you want active. Then do Repair/Compact DataDB. If this doesn't help, you will need to restore a backup of your DataDB and pick up data-entry from that point in time.

ERS TOOLS

ERS Tools is an auxiliary file maintenance program to ERS with an icon that looks like a diskette with an ambulance on it. ERS Tools can be accessed two ways:

1. click icon in ERS window (Program group) and enter your logon name & password.
2. click icon on ERS Main Switchboard (upper right). The main ERS program is closed when you open ERS Tools because Tools functions operate on the main program files.

Repair/Compact is similar to the File, Pack Databases command in ERS 3.x. It is used to keep the three different ERS database files in shape and to conserve disk space.

ERS4 AppDB is the Application file ERSAPP40.MDB, it contains the ERS program code, screens, and reports.

ERS4 DataDB contains all data in Adults, Youth, Staff, Perinatal, Interagency components, as well as the Checklist Additional Question Sets, Subgroups, and Filters (file ERSDAT40.MDB). Daily adds, edits and deletes in ERS4 affect this DataDB, swelling it's size. Run Repair/Compact DataDB regularly.

ERS4 TableDB contains the Race Code Table, RDA Table, Minimum Servings Table, Poverty Guidelines Table, & the Foods database (File ERSTBL40.MDB)

Run Repair/Compact before doing backups (at least once a month). Note that the Repair/Compact affects only the selected DataDB or TableDB. If you have multiple DataDBs or TableDBs, you will need to change to each one and do the Repair/Compact (& Backup) for it separately.

After any ERS or Windows system crash or Abnormal Exit & BEFORE running ERS

1. run ScanDisk (or Chkdsk /f if your DOS is earlier than version 6.20)
2. run ERS Tools Repair/Compact for each--AppDB, DataDB & TableDB

There is a note on the ERS Tools screen**: "If there are any error messages during the repair, the MDB is probably damaged and should be restored from a backup--even though MS Access reports the repair was successful**

For DataDB or TableDB, restore from your latest backup. For AppDB, install the latest update (or reinstall the software).

Change DataDB/TableDB

Allows you to select a different DataDB or TableDB, as long as it has been created within the ERS4 program. If it hasn't been set up within ERS4, you will not be able to attach it in ERS Tools with the Change DataDB/TableDB.

Backup

Why do Backups?

Backups should be done regularly. Consider how much time you spend entering data and how long it would take you to re-enter the same data, if the hard disk crashed, got a virus, or corrupted your DataDB. You can expect that something will go wrong with the hardware at some point, without warning. It happens. It is a lot easier to recover if you have a recent backup of your data.

The few minutes it takes to do a backup and test it is negligible, and managing the diskettes involved is not a problem, once it is set up and organized. The value of a backup is always underestimated until it is actually needed. At the beginning of a reporting year, a complete loss of your data is inconvenient, by the end of the report year, it is catastrophic unless you have a recent backup. Chances are you or someone you know has already experienced a complete loss of data and has had to start over.

How often? - Example Schedules

You should backup your data as often as makes you feel comfortable with how much work you would have to do to recover from a complete loss. Different units have vastly different amounts of data being entered on the computer, so there is no schedule that is right for everyone. Some might be comfortable with a Once-a-Week backup, others spend an hour or more each day entering data and a Daily backup would be advisable. **Whatever schedule you follow, take the time to remove the Backup diskette, re-insert it and Test it under Restore.** Consider taking your last month's backup off-site (natural disasters, theft, or vandalism can happen to anyone).

Once-a-Week Backup Schedule (assumes data fits on 1 disk, you may need to make sets of 2 disks). This schedule requires a separate backup disk for each week of the month, plus a monthly archive for at least 2-3 months back.

> Week 1, Week 2, Week 3, Week 4
> Month 1, Month 2, . . . Month 12

You would use the Week 1 backup disk for any backups you make during the first week of a month. You would use the Week 2 backup disk for any backups you make during the second week of a month, and so on with Week 3 and Week 4 disks. By keeping a separate disk for each week, when something goes wrong, you have 4 different "points in time" from which you might recover. The separate Month 1, Month 2, Month 3... Month 12 backup disk archive is a good idea too. On the last day of the month, you would make a backup to the appropriate Month number disk as an archive. That gives you a place to turn to if a problem went undetected for longer than your weekly backup disk rotation. It is unfortunately true that you don't always notice immediately when a database has become corrupt.

Daily Backup Schedule (assumes data fits on 1 disk, you may need to make sets of 2 disks)

This schedule requires a separate backup disk for day of the week, plus an archive for each week of the last month, plus a monthly archive.

Monday, Tuesday, Wednesday, Thursday, Friday
Week 1, Week 2, Week 3, Week 4
Last month, Month before last

In a given week, you would use the correct "day" disk for any backups done that day (before lunch and just before leaving for the day are recommended times). Each Friday, you would make a backup to the appropriate Week number disk as an archive. On the last day of the month, you would make a backup to the appropriate Month number disk as an archive.

What to Backup?
You will generally only want to backup DataDB files. The daily additions and edits to Adult, Youth, Staff, Recalls, Checklists and Perinatal components affect the DataDB file. The AppDB and TableDB files can be recovered by repeating the steps to install ERS and set up any state-level customization from your original CD and/or diskettes. Many units will only have one DataDB file for the current year, perhaps in the directory C:\ERS4\DATA or DATA98. If you have more than one DataDB that you are actively adding or editing data in (in separate directories), you need a separate set of backup diskettes for each DataDB.

Always do Repair/Compact for DataDB <u>before</u> backing up.

Restore

There are two different situations when you would use Restore.

1. **Restoring a Backup you have made to the original directory on the machine that created it.** In this case the directory already exists on your hard disk and the DataDB has already been created within ERS and linked to the hard disk directory. The destination that ERS Restore prompts is correct.

2. **Restoring a Backup to a different hard disk or directory, or to a different machine from that used to create it.** The Training data set is an example of this type of restore. The destination directory must exist before you can restore to it. You can create it outside of ERS with DOS or Windows techniques, or within ERS using the File Manager button under System Administration, DataDB & TableDB, Maintain. Before you can Attach your newly-restored DataDB in ERS, you will have to go to System Administration, DataDB & TableDB, Maintain, and Add DataDB; assign it a New DB name and link it to your data directory (Browse, select directory by double clicking on it, OK, and Save).

Exercise 7. Restore the Training database to your C:\ERS4\TRAINING dir.

We created the Training DataDB and the directory C:\ERS4\TRAINING in an earlier exercise. We are now going to Restore the Training data provided with the ERS4 CD to that directory, which will over-write the current contents of the Training DataDB. It should be empty unless you have been playing there already. The current DataDB shows in the box at the top of ERS Tools.

Open ERS Tools, if not already open

a) click icon in ERS window (Program group) and enter your logon name & password.
or b) click icon on ERS Main Switchboard (upper right).

1. If you need to, use Change DataDB/TableDB to select the destination C:\ERS4\TRAINING.

2. Click on the Restore button

3. Click on Locate and select the ERSDAT40.ZIP file, either on your CD drive or A: drive:
   on ERS4 CD, x:\ERS\TRAINING\ERSDAT40.ZIP
   on diskette, A:\ERSDAT40.ZIP

4. Click on Next

5. Click on Test, if it tests ok, press Enter or click on OK

6. Browse & select the correct destination, the one prompted may not be C:\ERS4\TRAINING

7. Click on Restore & you get a warning message:
   "C:\ERS4\TRAINING\ERSDAT40.mdb exists, do you want to overwrite it? Yes No"

8. since we do want to overwrite the empty DataDB we press Enter to accept the Yes prompt.
   A progress bar displays the Restore status... message "Restore from file 'A:\ERSDAT40.ZIP completed successfully OK"

9. Press Enter or click on OK

10. Open ERS4, verify Training is Attached on Main Switchboard

11. Go to System Administration, System Configuration and edit dates. The TRAINING data provided with the ERS4 program was collected for:

Unit ID	FL999	
Period Begin	9/1/96	(Edit 01-Jul-96 to 9/1/96)
Period End	8/31/97	(Edit 30-Sep-97 to 8/31/97)

SRS Exercise 7a. Restore the Training database to TRAIN1 and TRAIN2

Users of the state level program SRS, should have created the TRAIN1 and TRAIN2 directories and DataDBs to hold example ERS data, in SRS Exercise 5a.

1. Open ERS Tools, if not already open
2. use Change DataDB/TableDB to select TRAIN 1 & restore the training data to it.
3. use Change DataDB/TableDB to select TRAIN 2 & restore the training data to it.
4. Open ERS4 program
5. attach TRAIN1 (in System Administration, DataDB & TableDB)
6. in System Administration, System Configuration-
   [edit ID & Name]

Unit ID	FL000
Sub Unit	blank
Unit Name	TRAINING 1
Period Begin	9/1/96
Period End	8/31/97

7. attach TRAIN2 (in System Administration, DataDB & TableDB)

8. in System Administration, System Configuration-
   [edit ID & Name]
   Unit ID FL888
   Sub Unit blank
   Unit Name TRAINING 2
   Period Begin 9/1/96
   Period End 8/31/97

Once you have created Training, Train1 and Train2, you can make changes to the data in them and try things out. If you are a state level person, who is learning the SRS4 program too, do not change the Unit ID, Unit Name, Period Begin or Period End dates again. You just edited the Unit IDs and dates so that when the Summary data from each of these ERS4 units is exported, it will import correctly into an SRS4 state level training data set called TRAINSRS.

Watching the Daily Use and Advanced Videos and Doing the Exercises Can Increase Your Understanding of the Features Offered in ERS4.

UPGRADING FROM V 3.X?

If you are importing V 3.x data, your former System Configuration settings and Staff will be imported into ERS4, along with the client data and will overwrite any changes you have made in those areas before the import of V 3.x is done. If you have "real" changes, such as PP's to add or delete, you'll need to do them after you go to Data Interchange and Import V3 Data into your directory. New ERS4 imports which are part of the DataDB (Subgroups, Filters, Additional Questions) are not overwritten by the V 3.x data import.

Do the "Start New Reporting Period" steps in ERS V3.x
If you are upgrading to ERS4 at the time you start your new reporting year, do the "Start New Reporting Period" steps in ERS V3.x, before you import to ERS4. File, Start New Reporting Period. Delete Youth Groups, Youth, Volunteers and any PPs not continuing. Then File, Pack all Databases (F10, F5). ERS4 will need the database files from the "new" ERS 3.x directory. If you are upgrading from ERS 3.10 or earlier and had used the Checklist, you will need to upgrade to ERS 3.30 before you can import the Checklist data into ERS4.

Combine two ERS V 3.x Data Directories into One in ERS4?
It is possible to combine two V 3.x data directories into a single ERS4 directory and use subgroup codes to distinguish the clients. This requires the use of Subgroups & Filters and the Notebook Feature which are covered on the Advanced video (see Advanced part of the manual for the steps).

Updating from ERS V3.x, Steps to Complete the ERS4 Installation

ERS4 needs all the individual .dbf files (not the exported summary files) to import successfully. If both ERS 3.x and ERS4 are on the same computer (or network), you will be able to find them with Locate Files as you do the import. Appendix 7 "Copy ERS 3.x Data & Tables Files for ERS4" lists the files and is used to move them to a different computer.

The tables files provided by a new ERS4 installation are preferred to those in V3.x. If needed for an earlier year's data, import ERS Version 3 tables files to a separate tables directory, before importing the associated V3 data (or you'll have to re-import the V3 data).

1. On the Main Switchboard, verify that the directories listed for DataDB and TableDB are the correct destination(s) for your V3 import(s). If not, change them under System Administration, DataDB & TableDB (create new ones or attach existing ones).

2. Go to Data Interchange, pick Import V3 Data (we will be using the Tables from the new installation).

3. pick Locate Files, change drive and directory to find the correct directory. Then you are to double-click on the Adult.dbf to select it. The path to the correct directory should now be displayed in the box next to Locate Files.

4. Click on Import to begin the import from V3.x process. It purges any existing data, then file names are displayed at the bottom with a progress bar as each is imported. When finished, an "Import Complete OK" message is displayed. When you click on OK or press Enter, you are told to wait and then returned to the same screen. The status bar at the bottom now says Exit, so you click on the Exit door or press ESC once to go back to the Data Interchange switchboard, then ESC again to the ERS Main switchboard.

5. If your imported V3 Data used Nutrition Method 1, your state will most likely want you to Recalculate Recalls to apply the revised Foods database values to any recalls that aren't frozen. This is demonstrated on the *ERS Adult Daily Use, Optional components tape*. States that have not added any foods will just be using the federal Foods database from the new installation of ERS4 and would Recalculate Recalls now.
   Go to Nutrition, pick Recalculate Recalls, click on ReCalc.

   If your state has distributed a customized foods database, you will need to Recalculate Recalls after that file has been incorporated into your TableDB, through an import or copy, unless your state specifically advises against it. State customization is discussed on the *Advanced ERS tape*.

6. Make needed changes, such as adding new Paraprofessionals or deleting ones that left before the start of the reporting period (see Exercise 8 below).

Troubleshooting the Import of V 3.x Data into ERS4
If any files are missing from the hard disk, go back into the ERS 3.x program, using those database files and go into the part of ERS associated with the missing file and insert to add, then cancel. If you never used the Youth part, it might not have created the ygrace.dbf which tracks youth group race codes. Once you open and use that part of the program, ERS 3.x creates the database files you need, even though they may be empty. The Interagency file will not import correctly to SRS4 later if the FY start date is earlier than 10/1, delete record and recreate it now, if necessary.

SET UP FOR THE REPORTING YEAR

The System Configuration should be correct and the Paraprofessionals must be entered before Volunteers and Adult or Youth client records will be accepted by the ERS program. In Exercise 3, you set up your System Configuration, using state recommendations. In Exercise 6, you may have changed the names of your real DataDB and TableDB to DATA98 and TABLES98 (or 99). **Verify that you have Attached your real DataDB & TableDB and that your System Configuration entries are correct.**

System Configuration

Your state will provide you with Unit ID and Sub Unit codes, suggest a naming convention for your Unit Name, specify Period Begin & End Dates, and Nutritional Method. ERS V 3.x data imports with the V 3.x settings, correct them, as needed.

Unit ID: 2 letter State abbreviation and the 3 digit FIPS code
Sub Unit: The Sub Unit code can be used to distinguish between different computers or sites within the county. Sub-codes help distinguish between Adult (A) and 4-H (4H).
Unit Name: Use the unit's City/County name as the unit name. Your state office will recommend a naming convention to be followed. It is helpful to indicate Adult only or 4-H only as part of the unit name. If Sampling, the sampling rate is useful.
Period Begin and End: Should be a **12-month period,** often the federal or state fiscal year
Default Nutrition Method: State will specify
Allow Updates of Foods DB: F
Allow Updates of Tables: F

Staff Switchboard

Entry of adult records requires designation of the assigned staff member and entry of youth groups requires identification of the group's leaders. Thus, entry of the staff members must be one of the first tasks with a new database.

Staff ID numbers begin with a prefix which identifies the staff classification:
Professional: A00001 - new in ERS4
Paraprofessional: P00001 - should be assigned a unique ID in the unit. A Master list should be kept in the office. It is easy to get confused if the PPs are working on laptops, which only need one PP for clients to be entered.
Volunteer: V00001

ID P00000 is a special case. It is a place holder for a staff member who performs a professional or paraprofessional role, but is not included in PP summary reports for FTE, race or sex counts. It

could be used for a PP duplicated in a second directory to prevent double-counting on the state-level PP Summary.
Separate buttons are used to maintain the professionals, paraprofessionals, and volunteers, even though essentially the same information is maintained for each.

Staff may all be accessed by ID or by name. Additionally, Volunteers may be accessed by their assigned Professional or Paraprofessional.

Adding/Editing Staff:

Use the Staff Switchboard to select the level of staff you want to "add" or "edit." The steps are exactly the same for Professional and Paraprofessional staff. The Volunteer entry has a few additional questions about role and the staff contact. Steps given are for adding a Paraprofessional.

Exercise 8. Input the Paraprofessionals and Agent for your unit in the Data DataDB created by the new ERS installation (you may have renamed it DATA98 or Data99 in Exercise 6). If you imported current V 3.x data, you may only need to add agent and new PPs, edit hours, and delete any PPs that left before the start of the reporting period.

1. At the Main Switchboard information box, verify that your "real" DataDB (DATA98 or Data99) is Attached. If not, go to System Administration, DataDB & TableDB, select correct DBs and pick Attach.

2. Click on Staff to get the Staff Switchboard

3. Click on the Paraprofessionals by ID staff button.

4. A Browse screen listing of staff already in the system will appear. Information presented includes ID number, Sex, Name and City.

5. Click on the "Add Paraprofessional" button to enter a new PP into the database.

6. The system will prompt with the next available ID number which you can accept or enter a new one. PP IDs must be unique within the unit, keep a master list and refer to it before accepting the prompted ID. Assigning IDs to your paraprofessionals in alphabetical order can help you associate PP IDs to people when you first start using ERS.

7. Click on the "Next" button to enter information on the new staff member. The required fields are Sex and Race. Complete as much as possible if you plan to use mailing labels.

8. Annual Hours Spent with Adults/Youth are entered as a minimum at the end of the reporting year before the reports are exported to the state. Entering them on a monthly or quarterly basis can be a good management tool. It is recommended that you enter one "dummy" hour at this

time to identify the program assignment for the paraprofessional or volunteer. A PP or who works in both Adult and Youth EFNEP would have one hour in each EFNEP column.

9. After entering the requested fields, click on the Save button to retain the information.

10. When you have finished entering all the new Paraprofessionals click on the "Done" button to go back to the **PP by ID Browse Screen.**

Edit
Once you have a staff person entered, the "explode" [...] button on their line of the Browse screen allows you to edit the current information. The Edit Paraprofessional screen is one of two places where you can enter the Annual Hours Spent with Adults/Youth in EFNEP or non-EFNEP. If you make a change in the record, click on the Save button for the changes to be retained. If you select the Cancel button, you return to the Browse screen listing of staff. Selecting the Cancel button does not prompt about wanting to save the changes and changes are not saved.

Delete
The yellow button with the Red "X" on the same line, allows you to delete the staff member. You will be prompted to confirm any delete by clicking on Yes.

11. Select Professional by ID, then Add Professional to add your agent (prompts with staff ID A00001). If you had the agent as P00000 in version 3.x, and she is associated with continuing clients or Youth Groups, don't delete her P00000 staff ID for this first year, unless you edit all associated clients or Youth Groups to use the new A00001 Staff ID. You can enter her under the Professional category, and use only her professional A00001 Staff ID with any new clients or Youth Groups. After a transition year, you should be able to discontinue use of P00000 for the agent, by deleting that PP by ID Staff entry.

END OF THE REPORTING YEAR

The end of the reporting year tasks involve updating the records on the computer, checking for missing data and correcting errors, and reviewing the data for reasonableness.

Adult--Update Records:

All new clients enrolled through your state's cut-off date should be entered into the adult database. You should have continuing clients. The practice of only entering graduated clients on the computer does not reflect your total program and is not recommended for the EFNEP program. **All Adult clients** should be reviewed at the end of the reporting year, continuing Adults as well as those that have left the program. **It is a better practice to update graduating and terminating clients' data as they leave, during the year, rather than waiting until the end of the report year.**

Fields to be updated when the client graduates/leaves the program and at year's end for continuing clients:

Number of Lessons- A client may have had only 1 or 2 lessons when put on the computer at Entry. Continuing clients should be updated with the number of lessons as of year-end. This appears on Adult Summary as number 22, Length of Enrollment and Number of Lessons- Continuing in the Program. The ERS4 Advanced tape shows how a filter can be used to list clients that haven't been updated.

Lesson Type Where extra efforts have been made to graduate a client (Individual lessons, Lessons-by-mail and/or phone follow-up), it may be appropriate to change the lesson type to 3-Both group and individual, or 4-Other. This appears on Adult Summary as number 11, Type of Instruction.

is Pregnant mark if client was Pregnant **at any time during enrollment**
is Nursing mark if client was Nursing (Breastfeeding) **at any time during enrollment**
Children (If Pregnant or Nursing was indicated earlier, is there a new baby now?)
Subgroups verify that all appropriate ones have been entered for the client.

If client has left the program:
Reason 0 = continuing, 1 = graduated, >1 = various reasons for termination
Exit Date if not in current report year, client may be seen in Adult Browse, but **not in summary reports.** These clients will show on the PP List of Families but with no EXIT date, if exit date is after the report year.

EFNEP Helps should be marked only if client indicates that a referral or suggestion from your nutrition education program helped them to become a participant in one or more of the Public Assistance programs listed.

Public Assistance at Exit w/EFNEP Help	**should only be marked if EFNEP Help is marked**. Only those the client attributed to EFNEP help should be marked. Client may have been enrolled in some at Entry & Exit that were not affected by your referral or suggestion. It's possible that you helped them re-enroll in one listed at Entry.

Adult Graduates should have:
Each Graduate should have Entry & Exit Recalls. Depending on the optional components a unit is collecting, a Graduate should have Entry & Exit Checklists, including an Additional Question Set, if applicable. On the Perinatal Projects, a graduate should have the Dates of Birth (DOB) of all infants (Prenatal DOB within the reporting period) and a Breastfeeding End Record date within the reporting period, if collecting Breastfeeding data. If Sampling, only members of the sample would have Recalls and Checklists.

Check for Missing Data and Needed Updates
Use PP by ID or PP by Name to print each Paraprofessional a PP List of Families for All of their clients, in Landscape, by Name and also in Wide format, parts A, B, & C (only available by ID). The PP should look at the fields that need to be updated at the end of the year and could even write-in updates on the appropriate page of the Wide report (part A, B, or C) for the Data-entry person to work from.

Check for Duplicates
The PP List of Families for the Entire Unit, sorted By Name, 1-Line or Landscape, can be used to detect potential duplicate clients entered for more than one PP, as well as duplicates where client is entered for the same PP more than once. The 1-Line (A) provides last name, first name, ID, the first line of the address, phone number, Entry & Exit dates, and Exit Reason (code). For this to be most useful, encourage PPs to get middle initials, enter apartment numbers on the first address line, and get a phone number, whenever possible. If you assign ID number ranges to different PPs, you can quickly identify which PPs need to be involved in resolving any duplications found.

Why worry about Duplicates?
This is more of an issue where multiple PPs work with groups in an urban area. Duplication of resources and effort is one part of the concern, but also, your ability to show impact is reduced when clients start the program after having already made some improvement due to earlier education efforts.

Resolve Possible Duplicates
Have PP review for "close" but not quite identical entries--the ones where the name is typed slightly differently, the middle initial is given in one entry but not in the other. Be aware that a client who is enrolled twice can have:

- a different Entry Date (enrolled on different dates at same or different place)
- a different Exit Date (exited on different dates)
- a different Exit Reason (0 or blank=continuing, 1=grad, 2-8 =terminated different ways)
- a different First Name (with or w/o middle initial, nickname vs. legal name)
- a different Last Name (a typo or space, handwriting interpreted differently)
- a different Age (after a birthday)

a different Address 1 or Address 2 (with street name spelled differently, or apartment number left off or spaced differently)
a different PP (if more than one PP has enrolled the same client, must run Entire Unit list to see this)

Youth--Update Records:

Provide Youth program Paraprofessionals and Volunteer Leaders of Youth Groups with a Group Detail Report for all Groups and a Group Roster for all Individual type youth groups. Youth group data should be finalized with the Volunteer leader as soon as the group ends. Each Youth program PP should also receive a copy of the Youth Group Review to assist in contacting Volunteer leaders for missing data. Are any groups missing? Any Volunteer Leaders missing?

Items to be updated for Youth and Youth Groups:
Youth Group Membership, # Meetings, Contact hours, Impact Indicators, Group End Date, Youth in Other 4H. Use the Youth Group Review report to identify groups where number of meetings, contact hours, or group end date hasn't been updated. Contact PP/Volunteer leader for update information.

Youth Groups-PPARs
Use of the PPARs Impact Indicators will be guided by each state office. You should know what to expect from the groups in your unit and look at each Group Detail Report (you can preview all or print all) to see if the expected Impact Indicators have been entered for the appropriate Youth Groups. If you keep a log of the groups and record the PPARs values as you receive them, you will have organized the figures in a way that makes it easy to verify if the correct figures have been entered in ERS for the groups with PPARs indicator data.

Individual Youth
Have group leaders review rosters printed from the computer to check for missing youth. An individual Youth Enrollment Form should be submitted for any missing youth.

Staff--Update Records:

All PPs and Volunteers who worked during the reporting year should be entered. Print a list of the Volunteers associated with each Paraprofessional and have PP check it for errors (Staff, Staff Reports, Volunteers List, PP by Name, sort by Name, All Volunteers). A similar list for All Volunteers in the Entire Unit, sorted by Name can indicate duplicates across PPs.
Each Volunteer should have at least one role defined, though more than one role is acceptable.

Finalize PP & Volunteer Hours for the Year

Hours to be exported to state and federal office should reflect the entire 12 month report year. Separate columns for EFNEP and Non-EFNEP source of salary funds are now available, and hours are further divided into Adult and Youth. A PP or Volunteer only working with Adults should not have Youth hours, if only working with Youth, there should not be any adult hours.

The Summary Reports calculate and print FTEs from the hours you enter in ERS. The FTEs are based on the federal definition of hours/FTE:

1.00 FTE = 2080 hours	.50 FTE = 1040 hours
.75 FTE = 1560 hours	.25 FTE = 520 hours

EFNEP vs. Non-EFNEP

If your PPs are working with two different Nutrition Education Programs, such as EFNEP (subgroup A) and FSNEP (B), and their data is being entered for both programs in the same DataDB, with the appropriate subgroup code on each adult client, you will have something to enter in both the EFNEP and Non-EFNEP columns for PP hours. You would only expect to enter hours for work that is reflected in this DataDB.

If your PPs are working with two different Nutrition Education Programs, such as EFNEP (subgroup A) and FSNEP (B), but the data is being entered on two different computers, you would be putting PP hours in one column on one computer and in the other column on the other computer. You would only expect to enter hours for work that is reflected in this particular DataDB.

Duplicate Issue: PP or Volunteer entered in more than one data directory gets double-counted on SRS & FRS PP Summary or Volunteer Summary report. The use of subgroups can prevent this duplication**.**

In some cases we had PPs who were in more than one directory, because they worked with clients in the regular program and clients in the special project. If you had data in separate directories with the same PP appearing in both, the PP will be double-counted on the SRS & FRS PP Summary and you can't fix it.

Perinatal--Update Records: (Optional, may collect Prenatal, Breastfeeding or both parts)

Although optional at the federal level, follow your state's guidelines for use. All clients will show on the Browse screen and on the various "Perinatal Review Reports". The Perinatal component data for a client is removed when the Adult record is deleted, or through the "Start a New Reporting Period" process for clients shown as graduated or terminated on the Adult screen. Continuing clients and those missing some required information will show on the Browse screen and Review reports, but not on the Summary reports. To be included in the Perinatal Summary reports, additional criteria must be met. Check the Review reports for errors in required fields--ex. blanks or out-of-report-year dates for DOB (Prenatal) or End Record date (Breastfeeding). Cross-check the

PP List of Families to make sure that you have Graduated or Terminated those clients who have completed or dropped-out of the Perinatal Component.

Prenatal: Update Birth & Delivery information. For inclusion in the Prenatal Summary Report, the following are required: Date of Birth (DOB), Dates for First and Last CES Contacts, Curriculum, Lesson Location, and a Prenatal Exit Code >0 (Graduated before delivery, Terminated before delivery, or Active at the time of delivery).

Breastfeeding: Update Breastfeeding information, especially the starting/ending dates and dates other foods were introduced. The Breastfeeding Summary requires the Dates of Birth (DOB) for all babies. If Breastfeeding has ended: Date BF was discontinued, Reason, Date CES ceased contact must be entered and the End record date must fall within the reporting period. The Breastfeeding Summary includes a count of clients that have initiated Breastfeeding but not completed it during the reporting period (no End record date yet). Question 1 reports on those who did not initiate Breastfeeding--this is only meaningful, if you enter Breastfeeding records for clients who did not initiate Breastfeeding.

Interagency:

The Agent should assemble this information, perhaps keeping a log throughout the year of grants and contributions received, and Agreements/Coalitions established. WIC and Food Stamps offices should not be double-counted. If there are 2 or more agents completing Interagency reports that cover the same geographic area, such as when there are separate Adult and 4-H agents in the same county, the Adult agent would include the WIC and Food Stamps offices and the 4-H agent would omit them. Agents are expected to check with each other to resolve how many of the WIC and Food Stamps offices they have "served" of the total WIC and Food Stamps offices in their program's geographic area.

Add Interagency Cooperation Data for this Report Period:
From Main ERS Switchboard,

1. click on Interagency Cooperation

2. click on Add Fiscal Year

3. enter 10/1/start of FY "year" or your Reporting Period Begin date, if after 10/1

   Note that the **when the Interagency report in ERS prompts you to enter the new FY**, it is asking you to enter the **year for the first day of the fiscal year**, which is backward from the way most people identify data belonging to a particular fiscal year. If your report year starts before 10/1, you should use 10/1/__ for your Interagency FY start date to have SRS accept it, even though it differs from your defined report year start date.

4. enter data provided by the agent for each item,

5. click on Save and then Done to exit

If "Year" date is wrong, Delete and re-enter Interagency to fix
A very common mistake in ERS is that the year for the end of the fiscal year was entered. It is a mistake that is not easy to correct and it perpetuates itself, not accepting the correct year, if it was mistakenly used in a previous year. Using ERS, you can fix an out-of-synch Interagency date by printing out the Interagency reports for each year and writing the corrected year date on each one (10/1/__). Delete all of the incorrect Interagency records and re-enter the one for the current year with the corrected month and year. It's up to you if you want to re-enter the prior years, they would be selectable and viewable in the current year, if available.

ERS YEAR END REVIEW OF DATA BEFORE EXPORT TO SRS

Before Generating Summary Reports

1. Verify you are using the most current version of ERS--ERS Main Switchboard, Help, About

2. Verify computer system date and time are correct--on Win95 task bar clock, hold mouse over time for date, double-click to change

3. Check that you have the correct versions of the Tables with any State-modifications, as well as any Subgroups, Filters, or Additional Question Sets distributed by your state office.

   a) Tables, Race Code Table (File, Print Screen to print)
   b) Tables, RDA Table--first entry description changed to Female < 6 Mos with 3/98 revision
   c) Tables, Poverty Guidelines (FY98 family size 1 = $ 8,050 in contiguous 48 states)
   d) Nutrition, Foods by ID
      1523 Federal foods with Food IDs from 1 to 1540 (BEEF, PASTRAMI). 3/98 CD revision distinguished by the removal of 504 EGG, WHITE ONLY, RAW. Locate item 503, then ESC to browse list and see if it is gone. State-added foods appear after federal foods. Locate 1540, then ESC to browse the first state-added food. While in the browse list, CTRL-END will take you to the last food item.
   e) Subgroups, Subgroup List Report
   f) Subgroups, Subgroup Filter Report
   g) Checklists, Additional Questions, Question Set Report

4. Check the information box at the top of the ERS Main Switchboard:
   (If necessary, correct under System Administration, System Configuration)
   Unit ID (be sure you used the correct two letter State abbreviation and the 3 digit FIPS code [with a zero--not the letter O])
   sub unit code (if any),
   Unit Name (designate as Adult only or 4-H only, include sampling rate, if state requests it)
   Period Begin
   Period End

5. In ERS Tools, run Repair/Compact DataDB. This will refresh the data, removing deleted records and rebuilding index information

Generate & Review Reports

After you have updated the records on the computer, filled in missing data and corrected errors, it is time to generate Summary Reports. It is to be expected that additional questions will be raised in reviewing the Summary Reports, requiring further corrections before the data is final. Check that subtotals sum to totals, discrepancies may occur if Repair/Compact is needed on the DataDB.

Work with the broadest category filter first ("All" should be equivalent to "EFNEP", the default subgroup A, if you are only dealing with EFNEP). Discrepancies between "All" and the broadest category filter (such as FSNEP, subgroup B) when data for only one Nutrition Education Program is being entered in the DataDB (directory), would indicate that the subgroup code is missing from some clients. Once the totals on the broadest category reports cross-check, print reports for the other filters that interest your unit or state.

Adult Only units should have:
- A - Adult Summary
- D - Diet Summary
- C - Checklist Summary (optional, typically state-wide all units, if used)
- P - Perinatal Summary (optional, may only be a few units)
- S - Staff Summary (PP & Vol hours should have totals for year)
- I - Interagency

Youth Only units should have:
- Y - Youth Group Summary
- S - Staff Summary (PP & Vol hours should have totals for year)
- I - Interagency

Print Applicable Summary Reports
For your first look at Summary Reports, print all the reports for the broadest federal filter that applies, (ex. EFNEP or FSNEP).

1. Adult Summary

    a) Entire Unit, All
also b) Entire Unit, Grads Only
    c) Entire Unit, All, Sample (if sampling)

2. Diet Summary

3. PP Summary

4. Volunteer Summary

5. Youth Group Summary

6. Youth Delivery Mode Report

7. Checklist Summary

8. Prenatal Summary

9. Breastfeeding Summary

Cross-Check your Totals on Similar Reports:

1. # Adults who graduated on Adult Summary = # on Diet Summary = # on Checklist Summary

2. # Youth on Youth Summary = # Youth Delivery Mode (total youth, by race, by sex)

Look at the Adult Summary

- verify that the # of Adults figures look correct for different subgroups/filters:
  Filter EFNEP for federal subgroup A (or other appropriate one)
  If Sampling, Filter Sample for federal subgroup E (# correspond to sampling plan?)
- #7) If the State distributed a Race Code Table with race subcodes, do they show up?
- #8) Does Place of Residence actually reflect the unit? (Farm and Central City?)
- #9) Any Age 10 or under?
- #12) Number Terminated, should correspond to Diet Summary # of Exits
- #13) Months in program, excessively long may be clients you should terminate or graduate
- #16) Termination Reason, avoid "Other", try to be specific
- #20) zero lessons for Grad? Check top row, problem if "Entry" # Lessons has Total >0
- #22) Continuing w/excessive Number of lessons may be clients you should graduate

Look at the Adult Summary, Grads only

- #18) check if the number of lessons for Grads fits with state recommendations p.5
- #20) check if the length of enrollment for Grads fits with state recommendations p.7. Any Grads in the Entry row (0 lessons) suggests # lessons was not updated at exit

Sampling:

Compare the Adult Summary for the filter Sample, Entire Unit, All clients to Adult Summary for your broadest category. Review the Total number of program families included in the Sample. It should relate to the Total number of program families on your broadest category (EFNEP or FSNEP) Adult Summary for the Entire Unit, All clients. The ratio of Sample to Entire Unit total should reflect your sampling rate. The number of Grads in the Sample would be the expected number of Recalls on the Diet Summary, and Checklists on the Checklist Summary. **The demographic percentages on the Sample Adult Summary and the full unit Adult Summary should be similar, if the sample accurately reflects the general population of the unit.**

Look at the Diet Summary:

Correct Nutrition Method used? If more than one Nutrition Method has been used within a unit, ERS4 gives a "blend" of the Nutrition Methods contributing to the Diet Summary, which means that the number of graduates varies within the Diet Summary report. All graduates with Entry and Exit Recalls will be included part *I. Summary of Dietary Improvement* (based on Food Group Servings), but only those with Nutrition Method 1 or 3 can be included in *part II. Summary of Calorie/Nutrient Improvement.* Only those with Nutrition Method 1 appear in *part III. Distribution of Calorie and Nutrient Intake* questions.

State-wide default	**Diet Summary parts produced**
Nutrition Method 1	I, II, and III
Nutrition Method 2	I

Nutrition Method 3	I and II	
(all 3 Methods)	(Methods 1 or 3)	(Method 1 only)

Check that the # Grads in part I = # Grads in part II = # Grads in part III

- verify that the report sections expected for the Nutrition Method selected as state-wide default are present and that the number of graduates in those sections correspond with the Adult Summary number of graduates. If using Nutrition Method 2 state-wide, a smaller of grads in parts II and III due to entering data for Nutrition Method 1 for some clients is not really a problem. However, if the state-wide default is Nutrition Method 1, all three parts should have the same number of grads--if the number of graduates varies in parts I, II, or III, it suggests that records have been included where recalls were entered for Nutrition Method 2 or 3, by mistake.

Look at the Paraprofessional Profile

- verify that the number of paraprofessionals, reported FTEs, and their gender and racial/ethnic characteristics accurately reflect the PP staff and their budgeted workload for the Adult and Youth components of your unit. A PP identified as P00000 is not included on the PP Summary in race/sex counts or in the FTE.
- Hours worked should have been updated to reflect entire reporting year.
- Adult-only units should not have Youth PP FTE. Youth-only units should not have Adult PP FTE.

Look at the Volunteer Profile

- verify that the number of Volunteers, reported FTEs, and their gender and racial/ethnic characteristics make sense for the unit.
- Hours worked should have been updated to reflect entire reporting year. The default 1 hour per Vol x # Vols is usually less than 416 = .2 FTE for unit. Many volunteers, especially in the Youth program, contribute more than 1 hour.
- Adult-only units should not have Youth Volunteer FTE. Youth-only units should not have Adult Volunteer FTE.
- verify that the total number of Vols on part 1 is less than or equal to parts 2+3.
  All Volunteers (1) should <= # Youth (2) EFNEP Vols + # Adult (3) EFNEP Vols
  (A volunteer who works with both the Adult and Youth program is only counted once in the "All Volunteers" report, but shows up in each of the Youth and Adult Volunteer Summary reports)

Look at the Youth Group Summary

- #1) Do the numbers from individual enrollment vs. group enrollment look right?
- #2) Does the Number participating in other 4-H programs look right?
- #3) Do the Ages of the enrolled youth fit within state limits for 4-H enrollment?
- #4) Does Place of Residence actually reflect the unit? (Farm and Central City?)
- #5) Do the numbers of groups for the various Impact Indicators match those expected?
- #6) If the State distributed a Race Code Table with race subcodes, do they show up?

Look at the Youth Delivery Mode

- Number of Groups, Meetings, Contact Hours correspond to Group Review totals?

Export Summary Reports

Exercise 9. Export Summary Reports from the Training directory to SRS

1. Data Interchange, Export Summary Reports

2. **Don't check "Report Also" box-** **unless you want a copy for every defined filter in the DataDB. You will already have printed & reviewed the key reports**

3. Verify the Report Period dates

4. Insert a blank formatted diskette in drive A:

5. Click on Export button to start--get message box "Preparing EXPSUM40.MDB"

6. Label your diskette with your Unit ID, Sub Unit code, Unit Name, date created and what you exported--Adult, Youth, Checklist, Recall, Perinatal, Staff, Interagency...

7. Make a duplicate of your export diskette, keep one and mail the other to the state office.

If you have more than one DataDB
Attach each DataDB, in turn
verify the data in ERS Main Switchboard information box, make any corrections needed
create the Export Summary Reports disk for each DataDB
label it appropriately, make a copy to keep and mail the other to the state office.

SRS Exercise 9a. Export Summary Reports from TRAIN1 & TRAIN2 to SRS

a) Attach TRAIN1 and Export ERS4 Summary Data to diskette, label disk
b) Attach TRAIN2 and Export ERS4 Summary Data to diskette, label disk

START A NEW REPORTING YEAR

The "Start New Report Period" button under System Administration is used after you have submitted your year-end summary data to your state office. The start of a new report year is a time when states may make changes in the way you do ERS, adding new components, or modifying tables, subgroups, filters or Checklist Question sets. Follow your state's advice on how to proceed. The steps are described in general here.

System Administration, Start New Reporting Period

The basic function of this button is to create a new DataDB and TableDB, distinguished by the End date year on the end of the names. All Adults who have left the program through graduation or termination will be removed automatically from the new DataDB, along with any Recalls, Checklists, or Perinatal data they may have had entered. Youth Groups, Volunteers, and any Paraprofessionals or Professionals who have left will have to be deleted manually from the new DataDB under the appropriate switchboards. Provide PPs with printouts to identify any Youth Groups or Volunteers that should not be deleted.

1. Clicking the "Start New Reporting Period" button prompts with a new Begin date and End date for the New Report Period (increments existing dates by 1 year). It also prompts with a new DataDB and TableDB (basically increments by 1 year ex. DATA98 becomes DATA99). If you just had Data, it will add the 2 digits for the year, based on your prompted End date (DATA99 if End date is 9/30/99). A directory name will be truncated at 6 letters, so that the 2 digit year can be added.

2. You can edit the DataDB name and the directory name & path to be created.

3. You can edit the TableDB name and the directory name & path to be created. A Message box will prompt with "(directory name) does not exist. Create it? Yes No" Choose Yes each time. "Purging exited adults from the new DataDB" displays with progress bar. Message box "New Reporting Period is now established. Remember to Repair/Compact new databases soon. OK"

4. You are left with the new DataDB and TableDB Attached.

Youth Groups

Sometimes a Volunteer runs a group of the same name at the same location every year. The PP should identify any Youth Groups that should not be deleted on a Youth Group Review (print from past year's directory). If the Youth Group is continuing with different youth, the individual youth or the youth fields on the group enrollment will need to be deleted. All other Youth Groups should be deleted as part of starting the new report year.

5. If you have any Youth Groups to delete, go to Youth, Youth Groups by Group ID

6. Delete Youth Group by clicking its red X (in yellow box) and press Enter to Confirm delete.

7. Individually-enrolled Youth members are automatically deleted when their group is deleted.

8. If any Youth Groups were retained, you will need more information from the PP to know what edits to the contents of the group are appropriate at this time. By the end of the reporting period, if not sooner, PP should submit new enrollment information for any retained Youth Groups. Groups display on screen and on Group List with past year start and end dates, but not on the Youth Group Review. Compare current year Youth Group Review and Group List By ID to help identify groups that have not been updated for the current year.

Volunteers/PPs

PPs should identify any Volunteers that should not be deleted on Volunteers by PP, File, Print Screen

9. If you have any Volunteers to delete, go to Staff, Volunteers by ID

10. Delete Volunteer by clicking its red X (in yellow box) and press Enter to Confirm delete.

11. If any Volunteers were retained, go to Enter Hours, Volunteers, and reset their hours to 1 in all the relevant categories to start the new Report year with a blank slate.

12. For all continuing PPs, go to Enter Hours, Professional/Paraprofessional, and reset their hours to 1 in all the relevant categories to start the new Report year with a blank slate.

13. Add any new PPs under Staff, Paraprofessionals by ID, Add Paraprofessional. Be sure to enter 1 hour to designate appropriate categories under Adult/4H, EFNEP/non-EFNEP.

14. If your state advises, import individual update files at this point, or be sure to do steps 14-16 afterward, if you do it later.

15. Open ERS Tools

16. Do Repair/Compact DataDB on the new year DataDB

17. Do Repair/Compact TableDB on the new year TableDB

The new DataDB and TableDB should be ready for use, at this point. If there are unit level subgroups and filters to be defined, do that before entering new clients.

APPENDIX 1. CONTENTS OF THE TRAINING DATA SET

The ERS4 Training data set installs with System Configuration settings of:

Unit ID	FL999
Period Begin	7/1/96
Period End	9/30/97

Adult Summary:
372 Graduated (Completed program)
84 Terminated
62 Continuing
518 Total Adult clients
* bug - new Exit Reason A "Lost contact with client" was not included (only 1 record)

Diet Summary:
372 Graduated
83 Exited*

Checklist Summary
203 Entry & Exit on 10 Base Questions
12, 14, or 26 for Entry & Exit on various Additional Questions (some Q's in both sets)

Perinatal Projects- variations within summaries reflect incomplete data on some questions

Prenatal Summary	Breastfeeding Summary
80 mothers	59 initiated Breastfeeding, (1 BF & not done yet)
	29 did not initiate Breastfeeding

Description of Data Set Contents:

The ERS4 Training data set C:\ERS4\TRAINING is a combination of two data sets, E and H.

1. Data set E - an EFNEP unit with Adult, Youth, Volunteers, & Interagency

Adult
Adult with Recall (Nutrition Method 1) & Checklist for all 308 adult records, IDs 767-1076, all in subgroup A, 50 in subgroup Q

Checklist, Two 'Additional Question' Sets were defined in SRS4 and then exported to disk and imported into ERS4. Additional Questions were added to the first 10 records by ID that had both Entry and Exit Recalls, plus some others.

FATSALT	4 questions, 12 clients
NOCHOICE	5 questions, 14 clients

Youth
Both Individual and Group-Enrolled Youth records

Youth Groups-	Youth Impact Indicators were added to the first 10 records by Group ID and the first 10 by Group Name, plus some others.
Eat Variety	19 groups
Knowledge	19 groups
Select Food	13 groups

Practices 13 groups

Staff includes Paraprofessionals & Volunteers

2. Data set H - an ES-WIC special project unit with 210 Adult records.
   Nutrition Method 1 Recalls for all records, no Checklists
   IDs 3001-3210, Subgroups ACQ for all, Race code 2-04 for all
   Perinatal data for some adult records, no Youth, no Volunteers

Subgroups and Filters
- some were imported from SRS (F,S codes) and others were defined in ERS (U code)

Subgroups-

A EFNEP	308 all Adult clients from E data, 210 all clients from H data
C ES/WIC	210 all clients from H data
Q EFNEP taught at WIC site	50 clients from E data, 210 all clients from H data

Filters-

Federal

EFNEP	subgroup A
ES WIC	subgroup C (usually would not code client as both A and C)
FoodStamps	not a subgroup, receiving Food Stamps at Entry or Exit
PregTeens	not a subgroup, Pregnant and less than 20 years old
WIC	not a subgroup, receiving WIC at Entry or Exit

State

Haitian	has race subcode 2-04
PregNurs1	Pregnant, or Nursing infant less than 1 y/o (Perinatal eligible)
Sample	subgroup S, Sampling client=> has Recall and Checklist (now federal code E)
SpecProj	subgroup P, Special Project with additional grant funds
WICorFS	receiving WIC or Food Stamps, at Entry or Exit
WICorFSno	not receiving WIC or Food Stamps, at Entry or Exit
WICsite	subgroup Q, EFNEP nutrition education conducted at WIC site

Unit

Babyunder1	Female, with baby under 1 y/o
Nursnobaby	Nursing, but no baby under 1 y/o (filter error, actually only pulls Breastfeeding)
PFBabyund1	Pregnant, or Female with baby <1 y/o, (mb Perinatal, eligible for Healthy Choice)
PregNurs	Pregnant or Nursing

APPENDIX 2. ERS4 CD-ROM

Insert the ERS4 CD, then click on the readme.exe file located on the CD drive to display the following menu:

WELCOME TO THE ERS 4 CD
What would you like to do?
View the Readme file
Install ERS
Install Acrobat Reader (V 3.01)
View ERS Manuals
Open CD
Quit

A readme file called README.TXT (or README.WRI) is provided on the CD in \README\. Click on the View Readme file button or open the .txt file with a text editor like Notepad or the .wri file with Windows Write (Win 3.x) and print the contents for reference.

You will want to install the Acrobat Reader to view the manuals located on the CD on your computer monitor. The Volume 1 manual can also be printed from the Microsoft Word 7.0 files (MS Office 95 version) in the directory \ERS\MANUALS\WORD7\ .

Unit level personnel (County offices) can just pick the Install ERS button to start the ERS4 installation, if they have the CD-ROM.

State level personnel will need to pick Open CD and go under the \SRS subdirectory to find the SRS manuals in the \MANUALS subdirectory. The SRS installation file is under \SETUP. The programs to generate ERS and SRS installation floppy disks are both under \SRS (\SRSFLOP and \ERSFLOP).

NOTE: Files "copied" from the CD are marked Read-only, you'll need to remove this file attribute to make file usable. Installation, Import, & Restore from CD are not affected.

Win95: select file--File, Properties, uncheck box for Read Only
DOS: attrib -r A:*.* removes read-only from all files on drive A:. (*.zip, *.mdb)

APPENDIX 3. CONTENTS OF A NEW INSTALL OF ERS4

A NEW installation of ERS4 based on the 3/98 CD installs the tables current at that time, Subgroups A-E, and the filters defined in FRS. States may add state-level subgroups & filters and distribute them to units on diskette. Locally, you can define unit-level subgroups (up to 4) & unit-level filters (unlimited) for your own use.

Subgroups A-E currently defined in the federal level of the program (FRS), are installed

- A EFNEP
- B Food Stamp Nutrition Education Program
- C ES/WIC
- D Team Nutrition
- E Sample

Filters filters defined in the federal level of the program (FRS), are installed :

FoodStamps	Receiving Food Stamps
PregTeens	Pregnant & Age < 20 yrs
WIC	Receiving WIC/CSFP Assistance
<ALL>	Entire Unit

and individual filters that select the federal subgroups (records must be coded)

Foods database the federal foods database includes 1523 items with Food IDs through **1540 BEEF, PASTRAMI.** There have been changes since the 10/97 version released with ERS 3.3. Search for Food ID 503, if you see that **504 EGG, WHITE ONLY, RAW** is still there, you do not have the 2/98 federal foods installed. States may incorporate additional foods and distribute a foods database to units on diskette. It is not advisable for local units to make changes to the foods database, especially if their data is to be combined with others in a state-level summary.

Race Code Table **basic 5 race codes are installed. State may distribute a version that includes race subcodes to units on diskette.**

RDA Table first change since original ERS (3/98 first entry revised to "Female < 6 Mo.", from **"Female Infant"). "Load Defaults" button loads 3/98 version. You may need to press the Load Defaults button if you chose "Use Existing DataDB/TableDB" instead of "New" on the ERS Setup screen.**

Minimum Servings Table **has not changed since the initial release of ERS in 8/93.**

Poverty Guidelines Table new values released each year ~March. A new installation based on the ERS4 CD installs the FY97 version of the values for the contiguous 48 states and DC (family size 1=$7890, increment 2720). See install step 8 above to edit the Poverty Guidelines Table to insert the 1998 values **(Family size of 1 = $8,050, each additional family member = $2800). If you do not use the standard values, obtain your starting value and increment value from the ERS4 web site (see the HHS Poverty Guideline)** `http://www.reeusda.gov/ers4/home.htm` **or at** `http://aspe.os.dhhs.gov/poverty/98poverty.htm` **(for a different year, change 98 to 97 or 99).**

Figures for the contiguous 48 states:

	Family Size 1	Increment
FY96	**$7,740**	**$2,620**
FY97	**$7,890**	**$2,720**
FY98	**$8,050**	**$2,800**

Appendix 4. Re-installation Option - Use Existing DataDB & TablesDB

Already using ERS4?

When reinstalling ERS4, you will need to decide whether to pick a "New" install or to "Use Existing DataDB/TableDB".

A "**New**" install replaces any data in C:\ERS4\DATA with an "empty", non-customized file and replaces C:\ERS4\TABLES with the 3/98 federal defaults. It "forgets" the names and path to any other DataDBs or TableDBs that may have been defined, as well as any state customizations of the C:\ERS4\TABLES directory contents. Once you re-create the names and links to other DataDBs and TableDBs, they should function as before.

If you have been using ERS4, you can pick "**Use Existing DataDB/TableDB**" instead of "New", which preserves C:\ERS4\DATA and C:\ERS4\TABLES along with the definitions of any DataDBs and TableDBs already on your hard disk, including their existing subgroups, filters, Additional Questions, Foods Database, Poverty Guidelines & Race codes.

DataDB
Additional Question Sets, Subgroups, and Filters are part of the DataDB, along with all of your client data. Your DataDB should be restored from a recent backup, if it was lost. Verify that any state-customizations appear in the restored data.

If your state has custom Question Sets, you might need to import the individual update file CKQSET40.MDB. If your state has custom Subgroups & Filters, you might need to import the individual update file SUBGRP40.MDB.

TableDB
ERS tables can be made current by importing individual SRS-exported files, or by copying a state-distributed custom ERSTBL40.MDB file into C:\ERS4\TABLES. Verify that any state-customizations of the Foods Database and Race Code Table are present. Check that the Poverty Guidelines Table is current, you may need to re-define it.

Import Version 3 Tables
If you imported version 3 Tables, for compatibility with past years' data, you may want to update the RDA table to the 3/98 version, before generating Nutrition reports:

Go to Tables, RDA Table, and click on Load Defaults to get new categories (3/98 first entry is Female < 6 Mo.)

APPENDIX 5. ERS4 OVERVIEW

A. Start of the Year--Set up your Real Data Directory

Install ERS4, pick "New" Installation option.
Set up if new to the ERS program, starting from scratch:

1. Default DataDB created and attached on "New" install is "Data"

2. Under Security, enter 2 New Users with both Executive & Data Entry permissions

3. from Main Switchboard, go to System Administration, System Configuration and enter Unit ID, Sub Unit (optional), Name, Period Begin & End dates, and Nutrition Method.

Unit ID	is 2 letter state abbreviation + 3 digit FIPs code for your unit
Sub Unit	is an optional 3 character code to distinguish multiple dirs within a unit
Name	should include County, Adult only or 4-H only, & sampling ratio, if sampling
Period Begin	is the start date of your Reporting Year (varies among states)
Period End	is the end date of your Reporting Year
Nutrition Method:	1 = Computerized Analysis 2 = Food Group Servings 3 = External Analysis

4. Update Poverty Guidelines Table to current FY values for your state

5. Rename directories, add new DataDB & TableDB names with FY, if desired

6. Add/Edit Professional & Paraprofessional(s) to start year with 1 Adult and/or Youth hour

Set up if Importing Data from ERS 3.x:

1. Default DataDB created and attached on "New" install is "Data"

2. Under Security, enter 2 New Users with both Executive & Data Entry permissions

3. Update Poverty Guidelines Table to current FY values for your state

4. Rename directories, add new DataDB & TableDB names with FY, if desired

5. Go to Data Interchange
   a) Import V3 Tables (only if you need previous years' tables)
   b) Import V3 Data (brings in Unit ID, Name, and Report Year dates)

6. Add/Edit Professional & Paraprofessional(s) to start year with 1 Adult and/or Youth hour, delete any that left before the start of the reporting year

7. Go to ERS Tools
   a) Repair/Compact DataDB
   b) Repair/Compact TableDB

Federal Updates/State Customizations, state will provide diskette(s) and instructions

1. In ERS Tools, Install Software Update *(for updates to ERS4 program itself)*

2. In ERS, Go to Data Interchange, import all files specified by state office.*(for updates to ERS4 DataDB or TableDB contents)*
   a) Import Race codes from SRS
   b) Import Additional Question Set(s) from SRS *(Adult only)*
   c) Import Subgroups & Filters from SRS *(Adult only)*
   d) Import Foods database from SRS *(Adult only unless doing recalls with Youth)*

B. Daily Use

1. Add/Edit Volunteers (start year with 1 Adult and/or Youth hour)

2. Add/Edit Adults

3. Add/Edit Recalls

4. Add/Edit Behavior Checklist (*optional)*

5. Add/Edit Perinatal *(optional)*

6. Add/Edit Youth Groups

7. Add/Edit Youth (*if doing Individual Enrollment*)

C. End of the Reporting Year Tasks

1. Update Individual Records

Adult: All clients--# lessons, lesson type, pregnant or nursing at any time during report year, # children (new baby?), subgroups.
Exited clients--Adult Exit info., Exit Recall & Exit Checklist for Graduates

Youth: # Meetings, Contact Hours, Impact Indicators, Group End date, in Other 4H

Staff: Finalize PP & Volunteer hours for year

Perinatal:

Prenatal: Birth & Delivery information. For inclusion in the Prenatal Summary Report, the following are required: Date of Birth (DOB), Dates for First and Last CES Contacts, Curriculum, Lesson Location, and a Prenatal Exit Code >0 (Graduated before delivery, Terminated before delivery, or Active at the time of delivery).

Breastfeeding: Dates different foods were introduced and if Breastfeeding has ended, Date BF was discontinued, Reason, Date CES ceased contact, and End record date.

Interagency: complete information

2) Check for Missing Data

3) Resolve Possible Duplicates in Adult, Staff, & Youth Group Data, (Individual Youth duplicates are allowed)

4) Verify that you are in the correct directory and that your Unit ID, Sub unit code, Unit Name, Period Begin and End dates are correct. Verify that you have the current version of ERS installed, complete with any state-customized subgroups, filters, question sets, foods database or race subcodes. Verify that your computer displays the correct date and time.

5) Generate Summary Reports & Review. Make any additional corrections needed & repeat until totals cross-check and are reasonable.

6) Export Summary Reports to Diskette for SRS, make copy, & send to state office

APPENDIX 6. EXAMPLES OF ERS4 UPDATES

Updates may be needed if the federal or state office has modified files since 3/98 when the ERS4 installation CD was created. There are several scenarios at this point, your state office will provide you with needed diskettes and instructions. Update possibilities include:

A. diskette with a TableDB &/or DataDB to be **copied** via File Manager, Explorer or DOS
B. diskette with individual data/table file(s) to be **imported** via ERS4, Data Interchange.
C. file to update the ERS program itself via ERS Tools, Install Software Update (may be downloaded from ERS4 web site or distributed by state on diskette).

Choice A. State has sent a diskette with a DataDB and/or TableDB to be **copied**:

A DataDB can only be copied at initial set up when there are no continuing clients in ERS4. If copying a state-distributed custom ERSDAT40.MDB file to C:\ERS4\DATA, any Question Sets, Subgroups & Filters that were added at the state level are included. Substitute correct destination directory, if different:
At a DOS prompt, type `copy A:\ERSDAT40.MDB   C:\ERS4\DATA`

A TableDB is standard throughout a state for a given year, except for the Poverty Guidelines Table update. It does not affect continuing client data and may be used at any time. If copying a state-distributed custom ERSTBL40.MDB file to C:\ERS4\TABLES, any modifications to the Race code table and Foods Database that were added at the state level are included. Substitute correct destination directory, if different:
At a DOS prompt, type `copy A:\ERSTBL40.MDB   C:\ERS4\TABLES`

Choice B. State has sent a diskette with individual file(s) to be **imported:**

Follow the advice of your state office, you may need one or more of these imports, depending on what choices your state has made about components and customization.

* a) Import Question Sets from SRS (with State modifications)
b) Import Subgroups & Filters from SRS (with State modifications)
** c) Import Foods Database from SRS (with State modifications, usu. Complete Replacement)
d) Import Race Codes (with State modifications)

* for first-time ERS set up, you can skip a-b if copying a state-distributed ERSDAT40.MDB file to C:\ERS4\DATA
**can skip c-d if copying a state-distributed custom ERSTBL40.MDB file to C:\ERS4\TABLES

See the Unit Level Advanced part of the Training Manual for details on importing each type of file, Appendix 1 "Individual File Imports"

APPENDIX 7. COPY ERS 3.X DATA & TABLES FILES FOR ERS4

A. Copy All the DBF files Method
(Can use as long as all files fit on one disk, substitute your correct dir name & path)
1. put a formatted diskette in drive A:
2. type CD\ERS\DATA98 and press Enter
3. type COPY *.DBF A: and press Enter to copy all .dbfs to disk
4. type CD\ERS\TABLES98 and press Enter
5. type COPY *.DBF A: and press Enter to copy all .dbfs to disk

OR

B. Copy each DBF file Method
1. put a formatted diskette in drive A:
2. type cd\ers\DATA98 Enter
3. type each of the following one at a time and wait for the copying to be completed

ADULT Files

copy adult.dbf A: Enter	Adult enrollment data
copy recall.dbf A: Enter	Food Recall data
copy meals.dbf A: Enter	Nutrition Method 1 meal items
copy cklist.dbf A: Enter	Checklist data
copy staff.dbf A: Enter	PPs & Volunteers
copy sysinfo.dbf A: Enter	System configuration, reporting period dates
copy iacdb.dbf A: Enter	Interagency

4-H Files

copy ygroup.dbf A: Enter	youth groups
copy youth.dbf A: Enter	individual youth
copy ygrace.dbf A: Enter	youth group race & sex data
copy staff.dbf A: Enter	PPs & Volunteers
copy sysinfo.dbf A: Enter	System configuration, reporting period dates
copy iacdb.dbf A: Enter	Interagency

4. type cd\ers\TABLES98 Enter
   copy races.dbf A: Enter
   copy foods.dbf A: Enter
   copy povrty.dbf A: Enter
   copy rda.dbf A: Enter
   copy foods.dbf A: Enter

Type DIR A:*.DBF and press Enter to list files on the diskette after copying.
Type DIR *.DBF and press Enter to list the files on the hard disk.
Compare file dates and check that you got them all, **ERS4 requires them all to import from ERS Ver. 3.x,** even if some are empty (just access relevant part of ERS 3.x to create empty files).

Table of Contents - Unit Level Advanced ERS

UNIT LEVEL - ADVANCED ERS

INSTALLATION FLEXIBILITY--more complex ways to set up ERS4.

The Basic ERS-Unit Level tape addresses a minimal installation of ERS4 (one real data directory on one computer). The program allows a lot of flexibility in how it can be used at the local level. It can be used on one or on several computers (which may be networked, but do not have to be networked). Different county level offices have different personnel and computer hardware resources for delivering a Nutrition Education program and getting the data into ERS4, as well as different needs for the various reports that can be generated from ERS4. The different ways that the ERS4 program can be set up have different consequences which must be considered when choosing the set up that is best for your circumstances. When there are several units within the same geographic area (ex. Regular Adult, Spanish-language Adult, and 4-H) the state needs to provide guidance on set up (sub unit codes) and the local agents need to coordinate some aspects of their ERS4 reporting (Interagency), so that the data comes into the SRS level correctly.

Some counties use ERS4 with more than one Nutrition Education program (ex. EFNEP & FSNEP), and personnel may overlap. Some counties have distinct units for Adult and 4-H content areas of the same Nutrition Education Program, and divide up data entry responsibilities among two or more people, using 2 computers (Adult & 4-H). Other counties have the same PPs doing both Adult and 4-H and splitting into different directories would lead to double-counting PPs in race/sex categories on state level SRS PP Summary report. In some places, Paraprofessionals have laptops and enter their own clients. In others, PPs from several counties send all of their paperwork to a regional office for data entry by one specialist.

Evaluate your Resources

Take a few minutes and think about what resources you have available in computer hardware and personnel to do data-entry, and how much access data-entry personnel have to the computer. If you have more personnel and more computers, you should explore the "More than one Computer" options. The choices made about how many and which form of the various ERS components to use, affects the volume of data to be entered on the computer. If you have a large number of clients and are doing Nutrition Method 1 and the Checklist component, you may want to explore options to increase efficiency.

What are your Needs?

ERS for one unit on one Computer?

One directory (ERS gives county totals)
Multiple directories (distinct sub unit codes, need SRS to combine for county totals)

ERS for one unit on several Computers?
- **Not Networked**
  - **Multiple Computers** (distinct sub unit codes, need SRS to get combined totals)
  - **Notebook Feature** (one directory, ERS gives totals, regular coordination essential and time-consuming, try it out before adopting it)
- **Networked** (one directory, ERS gives totals, efficiency and ease of use depends on the network, try it out before adopting it)

Data-entry personnel: one or more than one, specialist or Paraprofessional(s)?
Access to computer with the ERS4 data directory: unlimited or limited (shared)?

Strategies for Increasing the Efficiency of Data Entry

More components + large number of clients = High volume of data to be entered and updated. You may consider adopting one or more of the following strategies:

1. increase the FTE allocation for data entry tasks, or have one specialist do it for all PPs.
2. increase access to computer with ERS4, if limited.
3. upgrade computer CPU speed and RAM, there are significant efficiency gains for ERS4.
4. consider Sampling Adult Recalls & Checklists to reduce data entry workload, especially beneficial if using Nutrition Method 1.

Advanced ERS Set up Considerations:

Using ERS with more than one Nutrition Education Program (ex. EFNEP & FSNEP):
Same computer? Different directories should not be a problem.
Same directory?
If data for both is in the same DataDB (directory),
1. you can't separate Volunteers and Youth for the different Nutrition Education Programs because they don't have subgroup codes.
2. You can only use one filter at a time and the FSNEP and EFNEP subgroups must be selected by filter if their data is in the same DataDB (directory). That means that you will need to create new filters, combining FSNEP or EFNEP

with any of the installed filters' criteria. The default PregTeens, FoodStamps, and WIC filters would pull all clients in both EFNEP & FSNEP.

Using ERS on more than one computer within a county or unit:
Separate installations w/sub unit codes vs. Notebook Feature w/subgroup codes

If you used ERS 3.x in multiple data directories on the same computer, you can either:
Convert into one ERS4 data directory w/Notebook Feature and subgroup code
or Continue to use multiple data directories under ERS4
--PP double-counted in race/sex on SRS if same PP in 2 data directories

Multiple Data Directories can be used:

Within a county/unit (if PPs don't overlap) on the same or different computers
State office should advise what sub unit codes to use for the different directories.
Separate units on same computer (Multi-county or regional data input)

Pros
- Allows independent data entry on separate computers or in separate directories without need for the regular merges required in the Notebook Feature.
- Deletes can be done at any time.

Cons
- Must use SRS to get combined totals
- If same PP in 2 data directories, PP double-counted in race/sex on SRS PP Summary
- Must use SRS to create Subgroups and filters then import them into each directory, if you want to combine them correctly for county-wide totals in SRS. Any unit level subgroups and filters would apply only to the directory where they are created.

The use of sub unit codes for multiple data directories in ERS, and importing them into SRS is illustrated by the exercises creating the TRAINING, TRAIN1, and TRAIN2 directories with imported training data, exporting summary reports from each (see *Basic ERS training tape*) and then importing them into the C:\SRS4\TRAINSRS directory.

Notebook Feature

Pros
- Allows flexibility in data entry, and produces single directory unit summary reports in ERS
- Avoids PP double-counting on SRS-FRS if PP works with groups designated by subgroup codes instead of in separate directories with sub unit codes as we had to do in ERS 3.x

Cons

- **Must be able to Merge and recreate CopyDB on a regular basis. The process should be done at least monthly and can be time-consuming depending on number of clients and CPU speed and memory of the computers involved (ex. Training DataDB takes ~10 min to backup laptop, restore to P-200 machine, check, merge then Prepare Copy Database & do it's repair/compact, backup, and restore to the laptop.)**

- **If a laptop's CopyDB diskettes are mailed back to the office for the Merge, no changes can be made to the laptop data until a new CopyDB is received and Restored to the laptop. The laptop CopyDB can only be merged with the MasterDB once. The MasterDB desktop machine must be used to create a new CopyDB which must then be put on the laptop via Backup/Restore before additional changes are made on the laptop.**
- **Any deletes made while a CopyDB is "out there", either in the MasterDB or the CopyDB, will be restored when the CopyDB is merged with the MasterDB. Deletes don't "stick".**
- **Any unit subgroups or filters created in the CopyDB will be ignored when the CopyDB is merged with the MasterDB. However, edits to subgroup codes that have been made in the CopyDB are retained after the Merge with the MasterDB. If desired, re-create the subgroups and filters in the MasterDB.**

Exercise 1: Test all the steps of Notebook cycle with Training DataDB on your computer

The video demo only shows the Prepare CopyDB, Merge CopyDB parts. Check in the Main Switchboard information box that the Training DataDB (created in the exercises for the ERS Unit level Basic videotape) is already attached. If not, go to System Administration, DataDB & TableDB, select Training and Attach it. You will need 2 formatted blank diskettes for this exercise.

The Complete steps of Notebook cycle with Training DataDB:
MasterDB is on an desktop machine, 2nd computer that CopyDB is taken to is a laptop.
When ready to create CopyDB, in ERS4 on the desktop machine:

1. **Go to Data Interchange, Notebook Feature**
2. **Prepare CopyDB (1st time must create a destination dir ex. C:\ers4\traincpy)**
   You can limit data to 1 PP or Vol, and to just Adult or just Youth. Note your choices for a speedier merge later. Realize that if you are preparing multiple CopyDBs (ex. for individual PPs), they will need separate destinations, or they will overwrite each other and you will not be able to merge the CopyDBs back. You will get a warning that you are about to overwrite a CopyDB, so you can cancel, if you need to. It's important to keep the directories and the associated CopyDBs straight.
3. **Change to CopyDB--System Administration, (1st time must Maintain, Add DataDB name ex. Traincopy)**

4. **Attach CopyDB (named Traincopy in directory c:\ers4\traincpy on MasterDB computer)**
5. *go to ERS Tools*
6. **Repair/Compact CopyDB**
7. **Backup CopyDB to diskette**
8. *go to laptop* **(1st time, laptop must have ERS4 installed and a DataDB created to accept the restored CopyDB)**
9. **Restore CopyDB from diskette to laptop directory for the DataDB you want used**

when ready to Merge back with office machine:

1. *go to ERS Tools on the laptop*
2. **Repair/Compact CopyDB on laptop**
3. **Backup CopyDB from laptop to different diskette (don't overwrite earlier backup)**
4. **Restore CopyDB to desktop (overwrites the DataDB file that was exported)**
5. **Change to MasterDB and Backup MasterDB (skip if have a current Daily backup)**
6. *open ERS*
7. **Attach the restored CopyDB and verify that it has good data**
8. **Attach the MasterDB**

9. Data Interchange, Notebook Feature, Merge CopyDB with MasterDB. You will be warned it the CopyDB does not belong to the MasterDB, or if it was previously merged. ERS will only Merge a CopyDB that has a serial number that belongs to the MasterDB and is current.

Merge is faster if you limit it, but you will need to know if CopyDB file is:
All Staff (default) or One Staff Member?
Adult Data, Youth Data, or Both Adult and Youth Data (default)?
w/Recalls?, w/Checklists?, w/Perinatal?

Merge strategy defaults to Use latest Revision and Be Silent about Adult ID conflicts. "Be Silent" means that if the same ID was added to both the Master and the CopyDB, the ID number of the CopyDB will be reassigned and then added to the MasterDB, without stopping to notify you.

You can choose to Use Master, Use Copy or Skip (only on Recall, Checklist, or Perinatal conflicts).
Use Master will only add Adults that have been added, CopyDB edits will be ignored.
Use Copy replaces any MasterDB add/edits with the CopyDB values.
Skip to ignore a section in the merge, if you don't collect it (Recall, Checklist, or Perinatal).
If you do collect data for the component, never Skip it.

SUBGROUPS & FILTERS (ADULT ONLY)

Subgroups Switchboard

Now let's explore the Subgroups and Filters that come with a new install of the ERS4 program. Subgroups are used to identify groups that can't be defined with the existing Adult data fields, by assigning member clients a unique subgroup code. Each adult must be assigned to at least one subgroup and may be assigned to as many as 8 subgroups. By default, the subgroup field on the Add Adult screen prompts with "A" for EFNEP.

The FRS/SRS/ERS system will allow up to 26 subgroup choices, designated A through Z. By clicking on the "View/Edit Subgroups" buttons we can see that a new install of ERS4 provides us with Subgroups A-E, defined by the federal level:

A	EFNEP
B	Food Stamp Nutrition Education Program
C	ES/WIC
D	Team Nutrition
E	Sample

Your state may choose to identify some subgroups which will have the letters M-V. The federal and state subgroups can not be edited or deleted at the local level. There are four subgroup designations, W through Z, which are reserved for the Unit level.

Filters select the adult clients who meet the filter criteria, based on what was entered on the Add/Edit Adult screen for the fields involved. A filter can be applied to many of the reports to customize the report for cooperators and key decision makers. Some of the reports include: Paraprofessional's List of Families, the Adult Summary, the Diet Summary, the Behavior Checklist Summary, the Perinatal Summary, and mailing labels. One filter at a time, may be utilized on a report. If you wish to combine the criteria of 2 filters, you need to create a new filter with all of the criteria.

Each level of the system may have its own subgroup codes and filters. There is no limit to the number of filters which can be created. By clicking on "View/Edit Filters, you can see the federal level filters which were included when ERS4 was installed:

FoodStamps	Receiving Food Stamps
PregTeens	Pregnant & Age < 20 yrs
WIC	Receiving WIC/CSFP Assist
<ALL>	Entire Unit

and individual filters that select the federal subgroups (records must be coded)

Filters are listed in alphabetical order by filter name, regardless of the originating source and are marked F, S, or U to indicate whether the Federal, State, or Unit level prepared the filter. The Unit level can view, but not revise or delete State and Federal filters.

Reports

The Subgroup List Report and Subgroup Filter Report allow you to print or preview the details of all the defined subgroups or filters.

The "Subgroup List Report" lists all subgroups, including F, S, or U, (for federal, state, or unit) level, "Subgroup ID" (the code used on Adult screen to indicate membership in the subgroup), and revision count and date.

The Subgroup Filter Report lists all filters showing the filter expression which is the definition of the filter, it's title, revision date and revision count, as well as the ERS level (F, S, or U) and FED for FRS, the state's SRS unit ID, or the unit's ERS unit ID.

Remember, Unit level subgroups and filters can be used to provide local partners impact data but are not exported to the state/federal level and can not be aggregated with other units' data in the SRS program. If you use multiple data directories within a unit, you must create state level subgroups and filters in SRS to have them available for the combined unit totals.

The process of creating, editing and deleting subgroups and filters is identical in SRS and ERS. The difference is that when Subgroups and Filters were created with SRS and exported for use in ERS, the summary data exported from ERS back to SRS contains them and allows SRS to generate state-wide summary reports using those subgroups and federal or state level filters. Filters give you the power to explore your data in new ways, to answer "What If" questions, and to assess data entry problems.

The ERS program has been designed to minimize potential data entry errors, but the complexity of the various components and flexibility necessary for its use by various Nutrition Education programs have left potential problems which can affect your summary reports. You can use filters to help analyze your data.

Filters in the Training DataDB

Let's look a little closer at the state and unit level filters that were defined in the ERS Training data and see how they can help you. Filters show what was entered on the Add/Edit Adult screen. For instance, if a woman was Pregnant at Entry and has been enrolled for a while, at the end of the reporting year the fields Children by Age = 0 and Nursing might need to be updated to reflect the birth of an infant and if Breastfeeding was initiated.

Comparing the PP List of Families with different filters can help you detect clients who need to be updated on the Add/Edit Adult screen. If you are collecting Perinatal Project data, you can compare the <ALL> version of the Prenatal Review or Breastfeeding Review with filtered PP List of Families as a cross-check (ex. while males can not be pregnant or nursing on the Add/Edit Adult screen, they are accepted in the Perinatal data undetected).

There are several filters in the Training data, the first three were on the video (*).

*	WICSite	state filter selecting EFNEP clients taught at WIC site--partner feedback, an example of when a subgroup is necessary, information is not already in ERS Adult fields
*	Babyunder1	unit level filter that lists females with an infant under 1 year. Both male and female clients can have babies, but we are only interested in Females who might have been Pregnant or might be Nursing while enrolled in our program. nAge00 is the field name for the number entered in Children by Age, 0. Children by Age categories (nAge00-nAge19) require the use of Manual Revise in building the filter.
*	Nursnobaby	unit level filter that claims to select those who are Breastfeeding but have no infant under 1 year old. (Might have forgotten to enter baby). This is an example of a filter that doesn't do what the description says it does. If you examine the filter expression it only checks for those who said yes to Breastfeeding--all of them. The infant under 1 y/o part requires a Manual Revision (AND nAge00<1), to be added in exercise 2.4 later.
	PregNurs	unit level filter that lists those who indicated Pregnant or Nursing (was the baby entered?)
	PregNurs1	unit level filter that lists those who indicated Pregnant or Nursing and who have an infant under 1 year old.

Comparing the PP List of Families for PregNurs and PregNurs1 can suggest clients who might not have been updated following the birth of their baby.

Haitian	state filter for the Haitian Race subcode, requires a Manual Revise to build.
WIC	federal filter for anyone receiving WIC
WICorFS	state filter for those receiving WIC or Food Stamps--Interagency targets
WICorFSno	state filter for those not receiving WIC or Food Stamps--potential referrals

A filter can print a PP List of Families for Grads who had 0 lessons entered, or less than 3, or whatever your state's minimum criteria might be. You could create a filter for clients with children of 4-H age and print mailing labels to send out a flier encouraging participation in 4-H, a special event, or to recruit volunteers.

A filter for a race subcode can be used to generate summary reports for a population of interest. When the ERS Training data was entered, the Haitian race subcode, 2-04 was defined in the unit level Race Code Table. The Haitian filter uses that race subcode to produce the PP List of Families and Summary reports for the Haitian population. You can view the Adult Summary with the Haitian filter to see how many 2-00s should change to 2-04s, if you attached a TableDB with a Race Code Table containing 2-04. If a state-designated Race subcode has not been imported by an ERS unit, it can't be entered for clients or staff. Members of the subcode would show under the main race code on the Adult, Youth, and Staff summary reports, and the corresponding State Summary Report totals will be off for the race subcode and any filters that used it.

Import/Export Issues

In order to get a state-wide summary of a filtered report, it must be a state or federal-defined filter and all units must have both installed the filter and coded any involved subgroups properly throughout the reporting year.

Previously used Subgroup or Filter name
If you import state & federal subgroups & filters to ERS, and a subgroup and/or filter of the same name was already defined, it will re-name the lower level subgroup/filter. For example, the Federal subgroup and filter called Sample caused the renaming of the State subgroup and filter to SampleS in ERS Training data.

Adding Subgroups:

Now let's create a subgroup for clients who are Taught at a Food Stamps site. The available Adult fields can identify clients who are receiving Food Stamps at Entry, but has no means of specifying where the nutrition education is taught, so we'll need a subgroup code to identify these clients.

Exercise 2.1 Create the unit subgroup W, Taught at Food Stamp Site in your Training DataDB.

1. **At the Main Switchboard, click on the Subgroups button to get the Subgroups switchboard.**

2. **Click on the "View/Edit Subgroups" button. The Subgroups browse screen is used to view information about all the subgroups and to add, edit, or delete Unit level subgroups. The browse screen displays the Subgroup ID (or code), which level of ERS created it (F, S, or U), the name of the subgroup, the number of this revision, and the date of the revision. On a unit level (U) subgroup, you can use the "explode" button to edit it or the "delete" button to delete it, the federal (F) and state (S) level subgroups can't be edited or deleted at the unit level.**

5. **Click on the "Add Subgroup" button to get the New Subgroup screen. The "Existing Subgroups" and the "Available IDs" are listed.**

6. **Clicking on one of the "Available ID's" is required before clicking on the "Next" button. You can select an available ID in any order. Click on W, then click on Next.**

7. **The "View/Update Subgroup Entry" will prompt for a "Name" for your new subgroup. Type in the name "Taught at Food Stamp Site"and click on the "Save" button to enter the new subgroup into the "Existing" list.**

9. **When finished adding new subgroups, click on the "Done" button. This action will take you back to the listing of "Subgroups" and adds the new subgroup to the list and designates the level as "U" for unit and today's date as the "Revision Date".**

Unit level subgroups can be "edited" or "deleted" from the "Subgroups” screen. Press ESC to return to the Subgroups Switchboard

Deleting Subgroups

It is suggested that subgroups be deleted only as part of the set up for a new reporting year. The system does not remove subgroup codes from Adult Enrollment records when a subgroup is deleted. Once a unit subgroup is deleted, you can not assign any new clients to it. Unless filters that utilize that subgroup code are also deleted or edited not to use it, the lists or reports based on that subgroup will be misleading, using only residual clients with the subgroup code still in the data set. At the start of a reporting year, Continuing clients might still have the code for the deleted subgroup. Do not reassign a subgroup code to a different meaning until those Continuing clients would have exited, unless you edit and remove the code with the old meaning from all clients who do not fit the new meaning of it. PP List of Families, Landscape (Format B), shows the subgroup codes assigned to each client.

Adding/Editing Filters:

There is no limit on the number of filters which can be generated. You will want to use an existing federal or state filter where possible, instead of generating an additional unit level filter. Participant Profile, Subgroup Selection, and Manual Revise are three approaches to filter creation that can be used separately or in combination to build a filter. It is easy to build filters just by clicking on choices under the Participant Profile or Subgroup Selection. We will explore them first and create a simple filter to produce reports for the "Taught at Food Stamp Site" unit level subgroup. Then we will use Manual Revise to create a filter to print a PP List of Families for Graduates with 3 Lessons or less, and to edit the corrections in the Nursnobaby filter.

Exercise 2.2 Explore building a filter via the Participant Profile and Subgroup Selection buttons. Create the FSsite filter in your Training DataDB.

(Video demo Taught at Food Stamp Site filter-FSsite, uses only Subgroup Selection)

1. **On the Subgroup switchboard, click on the "View/Edit Filters" button, to bring up a "Filter Development" browse screen. Federal and State filters cannot be "edited" or " deleted" at the unit level.**

2. **Click on the "Add Filter" button, to bring up a browse screen which lists "Existing Filters" and prompts for the "New Filter's Name". The new filter name can have only 10 alphanumeric positions. Call it "FSsite".**

3. **Click on the "Next" button to reach the "Build Filter" screen. The system will prompt for a "Title" which should be descriptive. Like subgroup names, the filter title can only be 25 characters long. Type "Taught at Food Stamp site" for the title.**

4. **Use the "Enter" key to prompt the "Participant Profile" section of building the filter.**

5. **Hitting "Enter" again opens the "Edit Participant Profile Filter" options screen. There are six sections where options can be designated: Age, Sex, Pregnancy, Breastfeeding, Lesson Types and Public Assistance. Use the mouse to click on the desired option in each section, your choices will be the criteria built into the filter.**

   Click on "Specific Programs" under Public Assistance. Three options are presented for each Public Assistance Program.

   A = Include if in program;
   B = Exclude if in program;

C = Don't care.

The default is C = Don't Care, which basically means that entry will be ignored. While we could click with the mouse to mark an X in box A for the Food Stamps program, it really isn't necessary--it's redundant. The subgroup code W identifying the client as being taught at a Food Stamps site implies that they are enrolled in Food Stamps. Since we haven't made any changes we need to save, you can click on either Cancel or Save to leave this screen.

6. Unless we wanted to more narrowly define the clients for our reports by selecting other options (Pregnant, for example), we only need to create a filter that selects subgroup W. We have no changes to save on this screen, so press Alt-C or click on Cancel to go back to the Build Filter screen.

7. Tab, then Enter or click on the "Subgroup Selection" button, to open the listing of subgroups by ID number. Three options are presented for each subgroup...
   A = include if in subgroup;
   B= exclude if in subgroup;
   C= don't care.

8. The default is C = Don't Care, which basically means that entry will be ignored. Click in box A for Subgroup W, Taught at Food Stamp Site.

9. Click with the mouse to "Save" the Subgroup Selection.

We have no additional criteria that need to be entered manually, so . . .

10. Press Alt-S or click "Save" with the mouse to save the new filter, adding it to the list of Filters on the "Filter Development" screen. Note the filters are listed in alphabetical order by the short Filter Name (not the longer Title). Unit level filters can also be deleted and edited from this screen.

Test the filter on a "known" data set to make sure it actually pulls the data you expected. That means you should edit at least one client to match the criteria of the filter in a "play" DataDB and then preview or print a PP List of Families for the entire unit using that filter. All of the clients you edited to match the criteria should show up in the filtered list, unless there is a problem with either the filter or your editing.

Edit a few of the Training data clients to also have the subgroup W. Test filter by previewing a PP List of Families for entire unit, selecting the FSsite filter, the clients you edited to have the W subgroup should all show up.

Doing the "Manual Revise" is discussed in ERS Manual, Volume 1, Subgroups Switchboard Chapter, page 83. It offers greater flexibility than the Participant Profile and Subgroup Selection alone. It is a good idea to develop filters in a "play" DataDB (like the Training DataDB), where you can edit data to match the filter criteria to test it. Model your "Manual Revisions" on the examples in the Training data set and in the manual and be sure to do a "Syntax Check" before saving your revisions.

Exercise 2.3 Use Manual Revise to create the Lesson3G filter in your Training DataDB.
This exercise (on video) demonstrates creating a filter that checks for Graduates with 3 Lessons or less, the Lesson3G filter.

1. Go to Subgroups, View/Edit Filters, then Click on Add Filter
2. Call it “Lesson3G”, and Enter twice to go to next screen
3. Type in title “Grad with<=3 lessons.”

In this example, none of the Participant Profile options are needed, nor any Subgroup Selection.

4. Click on the Manual Revise button.
   a) Type in: ExitCode="1" and LessonCount<=3
      Because the ExitCode is a "character" type of data (it represents a code rather than a count), it's number (1) must be enclosed in quotes. LessonCount is a "numeric" type of data, so no quotes are needed around it's number (3).

   b) Click on Syntax Check.
   c) If you got message "Filter has no syntax errors. OK", click on Save
      If you had an error, check your typing, Syntax Check again, and Save when it is correct.

5. Save again, then Press ESC twice to return to the Subgroups Switchboard
6. Edit a couple of the Training data clients to be graduated with 3 or fewer lessons.
7. Test the filter under Adults, PP List of Families, pick Entire Unit, select the "Lesson3G, Grad with <=3 Lessons" filter, preview or print. All the graduated clients you edited to have the 3 lessons or less should show up. If any are missing, it suggests a problem with your edits or with your filter.

   ExitCode="1" selects all Graduated clients
   ExitCode<"1" selects all Continuing clients
   ExitCode>"1" selects all Terminated clients

Exercise 2.4 Edit the Nursnobaby filter to add AND nAge00<1

This exercise corrects the Nursnobaby filter to pull those with a child under 1 y/o, not just those who indicated that they were breastfeeding.

1. Click on the "View/Edit Filters" button, to bring up a "filter development" browse screen.
2. Click on the Explode button [...] for the Nursnobaby filter to edit the filter
3. Click on Manual Revise and add AND nAge00<1
5. Click on Syntax Check, if it's ok, click on OK, then click on Save.
6. Click on Save again and press ESC or click on Exit door to Exit.
7. Click on Subgroup Filter Report and Preview to review the Nursnobaby filter, as edited, then ESC.
8. press ESC or click on Exit door to Exit to Main Switchboard
9. Test the filter under Adults, PP List of Families, pick Entire Unit, select the Nursnobaby filter, then Next and pick Preview or Print. The training data shows 3 clients that fit this criteria (1057, 3026, & 3142).

INDIVIDUAL FILE IMPORTS CAN BE DONE IN DATA INTERCHANGE

Imports for "Question Sets", "Subgroups & Filters", "Foods Database" and "Race Codes" follow the same basic steps and are Start of the Report Year tasks (see Appendix 1 "Individual File Imports").

Import Subgroups and Filters:

If your state chooses to customize some subgroups and/or filters, you may need to use the "import" function to make them part of your local database. The usual practice would be to do the import at the beginning of a new reporting year or the start-up of a new unit, but you will want to follow the guidance of your state leadership.

1. At the ERS Main Switchboard, select the "System Administration" button to attach the desired DataDB so that subgroups and filters are available in the correct location.

2. Once the desired DataDB file is attached, there are two switchboards where the subgroups and filters can be imported..."Subgroups" or "Data Interchange".

3. Using the "Data Interchange," click on "Import Subgroups and Filters" button.

4. The system will prompt for the "A" drive to be the "Import From" location. If the import is being done from another location, use the "browse" button to specify a different "Import From" location.

5. When the correct "import from" location has been identified, click on the "Import" button.

6. An import information screen will appear which tells you:
    - source of the exported file, date & time it was exported from SRS
    - version of SRS that was used to create it.
    - Revision Date: is the date/time of the file currently installed on your hard drive
    - Perform Import? Yes or No, with No as default if you just press Enter

   Click on "yes" (or type Y and press Enter) to start the import.

7. An "Import from A:\SUBGRP40.MDB completed successfully. OK" message ends import. Click on the "OK" button.

8. Use the "exit" door to return to the "Main Switchboard."

9. Click on Subgroups to open the Subgroups Switchboard.

10. Use the "View/Edit" buttons to see the subgroups and filters which have been imported.

11. The imported subgroups and filters are now ready to be used in the attached DataDB.

State Customization

The 3/98 ERS CD installs federal Subgroups, Filters, Foods Database, Tables with 5 main race codes and FY97 Poverty Guideline values for the contiguous 48 states, in ERS.

The State will check the ERS4 web site for any federal updates and send files and instructions to units. State-modifications, if any, will be sent to units on diskette at the start of the year and may include: Subgroups, Filters, Foods Database, Race subcodes, and Behavior Checklist Additional Question Sets.

If a state has been approved by the federal office to do Sampling, instructions will be provided to units by the state office.

First-time Set up of ERS4--Could Copy DataDB and TableDB

DataDB
For the initial ERS4 set up, States may send out a standard DataDB with State customization of Subgroups, Filters and Behavior Checklist Additional Question Sets. Even a unit planning to import V3.x data can copy a standard DataDB over their "empty" DataDB to get the state subcodes, filters and Question Sets. These new features of ERS4 are not overwritten by importing V3.x data, as Adult, Youth, Staff and Interagency data would be. Once a unit has started using ERS4, these new elements will have to be updated through the import of individual files, because continuing adult clients would be wiped out by copying over the DataDB. The DataDB changes daily as Adds and Edits are made.

TableDB
A TableDB file is standard throughout a state for a given report period (except for Poverty Guidelines update). The Poverty Guidelines table has new values issued every year around March, and must be updated in the unit level ERS program before year-end reports are produced and sent in.

The TableDB contains no client information or unit-specific data and can be used by multiple DataDB files on the same ERS computer. Your state may chose to distribute a diskette with the standard TableDB. Each unit would copy it to their TableDB directory, rather than having to import the Foods database and/or Race subcodes as individual files.

Verify that Customizations Installed Correctly

Each unit needs to verify that they have correctly installed their state customizations, before entering data, because Subgroup codes, race subcodes, food IDs, and Additional Question Sets that are not available on your installation you cannot be entered for your clients. If all units are not using the same set of subgroups, race codes, food IDs, and Question sets, the SRS state level reports will not reflect the actual situation, and how far off they are from reality will be unknown.

The state office should provide specifications of any customizations they have distributed. Compare them to your installation after you have followed your state's instructions for applying the customizations. Check that you have the correct versions of the Tables with any State-modifications, as well as any Subgroups, Filters, or Additional Question Sets.

a) Tables, Race Code Table (File, Print Screen to print)
b) Tables, RDA Table--first entry description changed to Female < 6 Mos with 3/98 revision
c) Tables, Poverty Guidelines (FY98 family size 1 = $ 8,050 in contiguous 48 states)
d) Nutrition, Foods by ID

    1523 Federal foods with Food IDs from 1 to 1540 (BEEF, PASTRAMI). 3/98 CD revision distinguished by the removal of 504 EGG, WHITE ONLY, RAW. Locate item 503, then ESC to browse list and see if it is gone. State-added foods appear after federal foods. Locate 1540, then ESC to browse the first state-added food. While in the browse list, CTRL-END will take you to the last food item.

e) Subgroups, Subgroup List Report
f) Subgroups, Subgroup Filter Report, for filters
g) Checklists, Additional Questions, Question Set Report

COMBINE TWO ERS V 3.X DATA DIRECTORIES INTO ONE IN ERS4

You can combine two ERS V 3.x data directories into one using a Subgroup code and the Notebook Feature, even when ID numbers overlap. In version 3.x we had to use separate directories to produce summary reports for groups of interest within a unit. For example, we used a separate directory for those "Taught at a WIC site", in addition to the main data directory. To combine them,

1. start with the "empty" DataDB from installation.
2. Prepare a CopyDB.
3. Change to the CopyDB and import the V3 data from the smaller data directory (ex. Taught at WIC site).
4. Define a subgroup and a filter to represent the data from the smaller directory (ex. "X", "Taught at WIC site").
5. Edit each member of the CopyDB to have the newly defined subgroup code (X).
6. Preview an Adult Summary Report using ALL and the new filter ("Taught at a WIC site), if both are the same, you successfully edited all members with the new subgroup code.
6. Merge CopyDB back with MasterDB.
7. Define the same subgroup in the MasterDB and also a filter to extract it.
8. Prepare another CopyDB
9. Import the V3.x data from the larger directory (won't need subgroup codes)
10. Merge CopyDB back with MasterDB. Merge will reassign ID numbers from the CopyDB, if any of them conflict with the MasterDB.

APPENDIX 1: INDIVIDUAL FILE IMPORTS

All imports can be done under Data Interchange, within ERS4
Your state will advise you which file(s) you need to import individually and will usually provide them to you on diskette.

Data Interchange:

a) Import Question Sets (or under Checklists, Additional Questions, Import Question Sets)
Import warning screen displays:
- source of the exported file, date & time exported
- version of SRS that was used to create it.
- Revision Date: is the date/time of the file currently installed on your hard drive
- Perform Import? Yes or No, with No as default if you just press Enter

"Import from A:\CKQSET40.MDB completed successfully. OK" message ends import.

b) Import Subgroups & Filters (or under Subgroups, Import Subgroups & Filters)
Existing unit level Subgroups & Filters are retained, but will be renamed if a state or federal filter used the same name.
Import warning screen displays:
- source of the exported file, date & time exported
- version of SRS that was used to create it.
- Revision Date: is the date/time of the file currently installed on your hard drive
- Perform Import? Yes or No, with No as default if you just press Enter

"Import from A:\SUBGRP40.MDB completed successfully. OK" message ends import.

c) Import Foods database
Follow state office recommendation re: Complete Replacement or Retain Local Changes
1. mark Import Strategy*
If you pick Complete Replacement:
2. Import. Your existing file is replaced with the imported one.
"Import Complete. OK" message ends import.

* **If Retain Local Changes is picked, the process can be lengthy and can't be interrupted.**
a. items that have differences in any fields will display side-by-side for you to compare them
b. conflicts will be marked with ****, you will have to use Page Down or the slider bar to see all of the fields.
c. select whether to keep your existing record or to replace it with the import record.

d) Import Race Codes
Import. Your existing file is replaced with the imported one. "Import complete. OK" message ends import. All versions of the races import file are called races.dbf.

Table of Contents - ERS Daily Use

ADULT TAPE

Daily use identifies the functions which are used in the day-to-day work with the ERS system. It includes the data entry of information on staff and clients as well as the client and cooperator feedback reports which are used in the management of the program.

DAILY USE--ADULT TAPE

All Adult clients are expected to have demographic information under the Adults Switchboard, along with Food Recalls at Entry and at Exit from the program. The state office specifies the standard Nutrition Method to be used for Food Recalls, although Nutrition Method 1 may be used locally, where the state has picked Method 2 or 3. If the Behavior Checklist or Perinatal Projects components are required by your state office, they are covered on the Daily Use--Optional Components videotape.

ADULTS SWITCHBOARD

The Adults Switchboard manages the data on the adult clients in the database. This is the place to add new adults to the data, modify existing clients' information, and summarize current status. The switchboards under Adults include: Adults by ID, Name and Staff; Summary Reports; Paraprofessional Lists of Families; Mailing Labels and Adult ID Ranges.

Adult ID Ranges:

Adult ID Ranges are used to set aside a block of client ID numbers for a particular staff person. This function will help connect Adult client IDs with specific PPs. This can be helpful when working with groups and to identify missing blocks of client ID numbers and the staff who is responsible. Setting the ID range for a particular staff at five times the annual adult enrollment should give sufficient range. Setting the ID Ranges to <all> encompasses the total available range for the unit. The following steps are used to set Adult ID Ranges:

1. At the Adult Switchboard, click on "Adult ID Ranges" button.
2. The browse screen shows existing ID ranges. From this screen, ID ranges can be edited or deleted.
3. A new ID range is added by clicking on "Add Range". The ID Range Names in Use are displayed.
4. The new "Range Name" is entered with the "Low" and "High" Values. One possible scheme for “range names” is to use the last name of staff who are working with adult clients.
5. By clicking on the "save" button the new ID range is added to the browse screen listing.

Adults by Name, ID, and Staff:

The "Adults by . . ." buttons allow the adding of new clients, editing of existing clients including entering exit information, entering of dietary recalls, behavior checklist and/or perinatal data, and deleting of clients. These buttons are the only places in the ERS program to add adult clients. If several clients are to be entered for the same staff person, selecting the "...by Staff" option would be suggested. The (OPS)'s name and ID number would already be visible on the "Add Adult Screen."

Adding a New Adult Client:

New Clients can be added under any of the "Adult By..." choices. This selection is personal preference.

1. Select the "Adult By..." button which is your personal preference. A "browse screen" will appear which displays Name/ID, Sex, City and Staff ID for clients already in the database. If the "Adult by Staff" is selected a listing of staff is presented which can be used to access clients by name/ID number.

2. Click on the "Add Adult" button for an "option" screen to assign an ID range <u>and</u> to select the staff person. The "ID ranges" can be <all> for the entire unit or a specific ID range for a specific staff person. The drop down screen will list the available staff for the new client to be assigned. Selecting the ID Range and specifying the staff person are two separate functions. A staff person <u>must</u> be selected for every client entered. The ID range is optional and not linked to the staff person's ID Number.

3. The ERS4 system will assigns the next consecutive client ID number to this new entry. This client ID number would usually be accepted.

4. Clicking on the "Done" button exits to the "Browse Screen" of clients by ID or name. Clicking on the "Next" button goes forward to the "New Adult" enrollment form.

5. The Client ID number and staff name and number will be in place for this new client.

6. Name, Address, and Telephone Number are important information for accurate records and data to be maintained. The completeness of the information entered can help in the identification of duplicate clients or entries. The completeness of the address including zip code is important is mailing labels are to be used to send information to clients. You will receive guidance from the local supervising agent regarding the importance of detail in this section. For the city, state and zip code fields the <ctrl R> key combinations enters the same information as the previous record. This will be a big time saver when entering groups of clients who reside in the same area of the county/unit. The telephone number has a "Stndr" button which will standardize the numbers typed in to reflect the area code and telephone number.

7. Sex is a required field and has a default of "Female." To accept the default, press the "enter" or "tab." If the client is a "Male," use the drop down screen to select or type "M."

8. Pregnant/Nursing is indicated by placing an “X” in the box. Notice that the Pregnant/Nursing choices disappear when the client’s “sex" is Male.

9. "Race," "Residence," and "Lesson Type," use a drop down screen. These are all required fields. If you know the correct number to indicate the selection, it can be typed in without using the drop down screen.

10. “Household Income” is optional and entered by typing in the amount directly.

11. “Number of Lessons” is entered as a direct number and needs to updated several times during the enrollment and especially at the time of EXIT.

12. "Children by Age" includes all the children in the house who the client has responsibility for food preparation. The desired age can be reached by either pressing the "enter" or "tab" key until the correct age is reached; or clicking the cursor on the correct age. Pressing <O> moves the cursor to “Others in the Household.”

13. "Entry Date" is a required field and can be added by typing in the date; or clicking on the calendar and selecting the month, day and year. The date format is numbers separated by hyphens (-) or slash (/) marks. Examples are 1-31-96 or 1/31/96. The month name can also be used followed by (-) or (/). Pressing <ctrl-R> inserts the same date as the previous record.

14. Subgroups are used to define the group associations which the client might have. Every client can have up to eight subgroup associations. The default is A for EFNEP. The "explode" button gives a pop-up screen to select appropriate subgroups. If the subgroup code is known, the letters can be typed into the text box.

15. Public Assistance at ENTRY indicates the names of the public assistance programs being utilized by the client at the time of enrollment. To indicate a public assistance program, click on the name or press the space bar when the program is highlighted to mark it with an X. Press "Tab," "Enter," the "up arrow," or "down arrow" key to the accept the selection and move on.

16. The “Jump” Button is used to access the switchboards for Recalls, Checklists, or Perinatal Projects. This is the most efficient way to enter a food recall, behavior checklist, and prenatal or breastfeeding data for a new adult client. We will return to do the food recall entry a little later.

17. After completing all the data fields, save the New Adult Record by pressing the “Save” button.

The system will prompt to “Add” an additional adult client. If you are adding several clients at this sitting, select the staff person, accept the new ID number and proceed to add the next client. If you are finished adding clients for today, select the “Done” button to return to the Adult Switchboard.

Editing Adults:

Client updates can be made through the Adults by ID, Adults by Name or Adults by Staff on the Adult Switchboard. The primary time for doing edits is at the time of client "EXIT" from the program. If several updates are being done for the same staff person, you might find the Adults by Staff as the best starting point. Each adult listing has three buttons to choose for editing the record...Explode, Jump and Delete. The "Explode" button opens an "Edit Adult" form screen. Any part of this screen can be edited. The "Number of Lessons" should be edited at the time of EXIT to reflect the number of lessons taught to the client. Clicking on the "Exit Interview" button prompts for a series of questions to be answered at the time of EXIT from the program.

- The Exit "Reason" is requested with the default being "Not Yet Exited". The drop down box, give the options to be used. Units are encouraged to avoid using the "Other" category.
- The Exit Date determines how this record will be handled in the yearly reports. If the date falls within the reporting year, an exited adult will be shown as "graduated" or "terminated."
- Public Assistance at Exit w/ EFNEP Help is used to indicate if the client is receiving public assistance as a result of participating in EFNEP. Use the mouse or press spacebar to mark an "X" in the appropriate boxes.

The "Jump" button can be accessed from this "Edit Adult" screen or from the "Adults by..." Browse list. The "Jump" button allows editing of any existing, or entry of a new recall, behavior checklist or perinatal record for this client. The "Delete" button is used to remove duplicate clients. The "Save" button is used to retain any changes made in the adult record.

Key Points for the Adult Switchboard:

1. Staff must to be entered into the database before clients can be entered.
2. Setting an Adult ID Range for paraprofessionals is a good management tool.
3. All adult clients must be assigned to a staff person.
4. Adult Switchboard is the only place to add a new adult client.
5. The computer assigns the next consecutive client ID number which is normally accepted.
6. The "StdNbr" button is used to standardize the format of a telephone number.
7. Using a complete address and zip code helps resolve duplicate names and duplicate entries.
8. "Number of Lessons" is the most accurate when entered at the time of client Exit.
9. Every adult client must be assigned to at least one subgroup and may be assigned to up to eight.
10. The "Entry" and Exit" dates will determine how the client is handled in the year-end reports.

11. **The required fields for the Adult Enrollment are: Sex, Race, Residence, Lesson Type, and Entry Date.**

Exercise: Relating to Adult Clients: (see Attachment 1 and 2)

Adding Adult Clients:

1. **Enter Adult Enrollment Form information for Sue Bread, except the Exit Information. Attachment 1.**

2. **Enter Adult Enrollment Form information for Betty Betty. Attachment 2.**

3. **Record ID Number generated by the computer on Adult Enrollment Form.**

Editing Exit Information for Clients:

1. **Edit the screen to show the birth of the baby and that Sue Bread is now breastfeeding.**
2. **Enter the Exit information on the Adult Enrollment Form for Sue Bread.**

Deleting Adult Clients:

1. **Delete Betty Betty from the Adult Database.**

Food Recalls

Using the Jump Button:

Food recalls can be entered from the Jump Button or from the Nutrition Switchboard. A "Jump" button for each record is available from the Adults Switchboard under the "Adults By" Browse screens. The Add Adult Screen "Add Adult" button, and the Edit Adult Screen "Explode" button have a "Jump" button to help you move among components to enter or edit entries for a particular client. You can "Jump" to Recalls, Checklists, and Perinatal Projects components. It is generally recommended that the Entry food recalls be entered at the time you add the client. When ready to exit a client, use the "Explode" button to edit the Adult record and provide Exit information, then "Jump" to "Recalls" to put in the Exit recall.

There are three "Food Recall Methods" to consider:

1. **Computerized Nutrient Analysis uses the foods database and provides the most extensive analysis and reporting. The food items consumed are entered and the system calculates the food groups, nutrients, etc.**

2. **Food Group Servings allows for the input of the number of servings of each food group.**

3. **External Nutrient Analysis where the results from some other manual or computer system are entered.**

Regardless of which Nutrition Method the recall is entered under, the steps are very similar:

1. **Locate the client who has a food recall to be added.**

2. **If using the "Jump" button, click on "Recalls" when prompted.**

3. **A "Recalls" browse screen appears which shows the existing recalls for the client. If no recalls are shown, no recalls are part of the record. From this screen you can:**

   - **edit an existing recall,**
   - **add a new recall,**
   - **edit a recall date,**
   - **print a diagnostic report, or**
   - **delete a recall.**

Adding a New Recall:

1. **Click on the "Add Recall" button.**

2. **When entering the first recall for a client, you will be prompted to a "Select Nutritional Method". The default system for the DataDB being used is set in the System Configuration under the System Administration. This decision is made only once for each client.**

3. **Date is a required field for a recall. There will be a warning if the date is suspect but the date and the recall will be accepted.**

4. **"Taking Nutritional Supplements" is indicated by using the "space bar" while the item is highlighted or by clicking with the mouse.**

5. **"Amount spent on food last month" is an optional field and typed in directly.**

6. **"Exit Interview" is indicated by using the "space bar" while the item is highlighted or by clicking with the mouse.**

The Nutritional Method Selected will determine the remainder of the entry for the food recall.

Nutrition Method 1: Computerized Nutrient Analysis

1. **To begin entry of food items, click on the "Enter Meal Items" button and then the "Add Meal Item" button.**

2. **Entering a meal item consists of entering the Meal Type Code, the ID or Name of the Food Item, and the Quantity Consumed.**

3. **Meal Type Codes identify the time of day and are presented in a drop down screen. Meal Type Code is a required field.**

4. **Data entry is faster if the foods have been pre-coded and the data entry person does not have to look for the foods. When the "Food ID" is entered, the "Food Name" will appear.**

5. Pressing the "enter" key will accept the food as correct.

6. When foods are not pre-coded, the name of a food will need to be entered. There are two options for locating the food ID number: typing in the name and/or using the drop down list.

   - The drop down list lets you select a food item and requires use of one of the "enter" options for the selection to be accepted.
   - Typing in the name and using the browse button lets you look at related items to find the correct entry. The mouse can be used to move the cursor or the "up" and "down" arrows to highlight the correct food item. The "use" button is clicked to accept the food item from the browse list.

7. "Quantity Consumed" reflects the unit of measure for the particular food item. Type in the amount and use one of the "enter" options for the input to be accepted.

8. Exit Options:

   - The "undo changes" button, wipes out what you have just entered and leave you in the "Edit Meal Item" screen.

   - The "cancel/done" button, wipes out what has just been entered and takes you back to the "Meal Items" screen. The food items entered thus far are reflected in the list of meal items.

9. As meal items are added and saved, a listing of "Meals Items" is being built which shows the foods eaten and the quantity.

10. The "explode" button, allows you to edit the food item if needed.

11. The "Exit" Door calculates the nutrient and food group values for this new recall.

12. The "New Recall" must be saved to attach it to the client record and have it appear in the list of "Recalls."

Nutrition Method 2: Food Group Serving Input

1. Enter the "Number of Meals" consumed.

2. Enter the number of servings from each of the food groups and other.

3. "Save" the recall.

Nutrition Method 3: External Nutrient Analysis

1. Enter the "Number of Meals" consumed.

2. Enter the number of servings from each of the food groups and other.

3. Enter the calories and total intake for each of the nutrients.

4. "Save" the recall.

Entering Food Recalls Under the Nutrition Switchboard:

If entering Food Recalls under the Nutrition Switchboard there are three options....by adult ID, by adult name, or by staff ID. All three options offer the same entry screens and provide the same outputs. The selection is personal preference. The "browse" screen works the same as under the "Jump" button on the Adult Switchboard.

Edit a Recall:

The "explode" button leads to the "Edit Recall" screen which displays the food group servings, calories and/or nutrients for that particular recall.

Nutrition Method 1: The "Enter Meal Items" button is used to edit, add or delete foods in the recall

1. Clicking on the "Enter Meal Items" button brings up the "meal items" screen which lists the foods currently in the food recall.

2. The "explode" button is used to edit the food or quantity or pick the "add menu items" button to enter additional food to the menu.

3. When meal items are entered there are three ways to leave the screen:

    - The "Save" button is used to keep any new foods which you have added or any changes.
    - The "undo changes" button wipes out the addition just made and leaves you at the "edit meal item" screen.
    - The "cancel/done" screen move you back to the "edit recall" screen.

4. After all the changes have been entered, use the "exit" door to see the new recall summary including the food groups included and the nutrients received from the foods eaten.

5. Even though the foods have individually been saved in the recall, you must use the "save" button to successfully attach the food recall to the client's file. Using the "cancel" button will wipe out the foods entered.

Nutrition Methods 2 and 3:

1. Edits are typed directly in the field and changes are "saved".

Key Points for Food Recalls:

1. The "Jump" button is the most efficient place to "add a recall" as a new client is being entered/or EXIT data is being entered.

2. The decision on which "Food Recall Methods" is to be used is a state and unit decision. When entering the first recall for a client, there will be a prompt to "Select Nutritional Method."

3. An adult client has to be entered into the database before a food recall can be added.

4. Date is a required field for a food recall entry.

Exercise: Adding 24-Hour Food Recall (see Attachment 3)

1. Add the 24-Hour Food Recall for Sue Bread using Method 1, 2, or 3 based on your state's decision. Attachment 3.

2. Print out the report(s) for the 24-Hour Food Recall.

3. Add a 24-Hour Food Recall for Client # 1072, Charles Cuyler, using Nutritional Method 1.

4. Print out the report(s) for the 24-Hour Food Recall.

Adult Reports:

Adult Summary Report:

The "Adult Summary Report" is a seven page report which gives a profile of the clients, information on length of enrollment, and number and type of lessons. Selecting the "Adult Summary Report" provides an option screen to:

- set the reporting year,
- pick the filter to be used,
- select for the entire unit/ a particular staff person or by zip code, and
- select for all clients or only graduates.

After making the selection, press the "Next" button which provides a choice to "print/review report". Previewing first is usually considered a good idea. When previewing, clicking the mouse alternates the screen between full page and 100% projection. The "ESC" key exits from the preview screen back to the option screen to select another report to print/preview.

If you select to print the report for a particular staff, you have a list of staff to chose from with the option of "print" or "preview" at that level. There is an option to "print all" which prints summary reports for each individual staff person.

Paraprofessional's List of Families:

The "Paraprofessional's List of Families" is a good management tool to look at the number of clients taught and completed by each staff person in a designated period of time. It is a quick means to determine missing information on clients including ENTRY and EXIT food recalls and checklists. The "Options" screen gives the opportunity to customize the "Paraprofessional's List of Families". Choices include:

- **Reporting Year;**
- **Subgroup filters;**
- **Paraprofessional Options: by ID, by Name, by Zip Code;**
- **Client Options: All or Continuing; Sort Options by ID or Name.**

The report can be generated in three Formats:

- **A is one line which is portrait;**
- **B is landscape; and**
- **C is wide which is landscape and covers three pages.**

Landscape or option B seems to give the most helpful information including being able to see if Entry and Exit Recalls and Checklists have been entered.

Mailing Labels:

The Mailing Labels function allows preparation of mailing labels for participants.
An options screen allows you to:

- **define the reporting period,**
- **the subgroups filter,**
- **whether for a specific staff person or the entire unit,**
- **status of clients to be included . . . all, graduated, or continuing, and**
- **how the labels will be sorted.**

The option exists to export the names and addresses to a dBase file.

Food Recall Reports for an Individual Client:

The "Participant Diagnostic Report", "Food Recall Review", and "One Day Recall Summary" reports for individual clients can be accessed under the Nutrition switchboard through their entry under a "Recall by" button, or through the "Food Recall Reports" button. From an Adults switchboard Browse screen, you can go directly to Recalls for an individual by clicking on their "Jump" button and selecting "Recalls".

Use the Print Button on the Recalls Menu: The "print" button on the client's "Recalls" screen is used to print the report for a particular client. The "report type" buttons allow selection from

three report formats: "Participant Diagnostic Report", "Food Recall Review", and "One Day Recall Summary." The Output Mode option buttons lets you select to Print or Preview.

"Participant Diagnostic Report" is a four to five page report. The report includes the Analysis of the Food Recall, How the Diet Fits into the Daily Food Guide, Nutrient Analysis of the Diet, and Foods Eaten from Each of the Nutrients. This report is most useful if using Nutrition Method 1 and the report is printed and given to client as part of the educational program.

"Food Recall Review" report provides a listing of the foods and quantity consumed and only applies to Nutrition Method 1. It is a good way to verify that the foods were coded correctly and the quantities entered correctly.

"One Day Recall Summary" is a pictorial summary of the participant's intake of the five basic food groups as compared to the recommended number of servings. Nutrients are summarized and compared to the recommended dietary allowances.

Individual Food Recall Reports for Multiple Clients (Batch printing)

The "Food Recall Reports" button on the Nutrition Switchboard can be used to print a recall report for one client or for several clients at the same time. The three reports in "Report Type" are the same as under the "Recall" screen print button, discussed above for individual clients. The major advantage of using the "Food Recall Reports" is that you are able to "Batch Print" by ID, Name, by Staff or only those clients that had Changes. The Output Mode button is used to select Print or Preview. The Preview option is not available for batch printing, only on single client reports. When using the "Batch Print by" buttons you will select the records to be printed by clicking the mouse, using the space bar or tab to put an "x" in the "select box."

Batch Print Changes is used to print the selected report type for all participants with modifications to the adult record or the recall record since a selected date, expressed as days prior to today. This function allows printing of recalls for new clients entered during a specific period of time without having to individually select the clients to be included in the "batch" print.

Diet Summary Report on the Nutrition Switchboard:
The "Dietary Summary Report" function provides reports and graphs on dietary improvement of participants for designated report periods and groupings. Reports and graphs can be generated for: the entire database, by staff member, or by ZIP code. Filters can be used to further define which participants to include in reports or graphs.

To be included in the Dietary Summary Report, adults must have:

- exited the program (with or without objectives met), and
- completed both an Entry and Exit recall. The Exit date must fall within the reporting period.

After selecting the Reporting Period, Subgroup Filters, and Adult Selection, use the "Next" button to access the print and preview options. All reports and graphs can be previewed or printed. It is possible to preview the graphs individually to determine the most helpful ones. If selecting "ZIP code" as one or your descriptors at least a two digit number must be provided. It can be more specific.

Exercises: Adult Reports

Adult Summary Report:

1. **Select a report for the 9/1/96 - 8/31/97 Reporting Period which is for the Entire Unit, Grads Only and has a filter of Food Stamps. Print the report.**

2. **Select a report for the 2/01/97- 2/28/97 Reporting Period, for a with a status of All and the Subgroup Filters set to <all>. Print the report.**

3. **Compare the information provided on the two reports.**

Paraprofessional's List of Families:

1. **Select a report for the 9/1/96 - 8/31/97 Reporting Period which is for a by Name, All Homemakers, Sorted By Homemaker Name and in the 1-Line Format. Print the report.**

2. **Select the same report except Sorted by Homemaker ID and in the Landscape Format. Print the report.**
3. **Select the same report except for the Entire Unit and in the Wide Format. Print the report.**

4. **Compare the information provided by the three reports.**

Nutrition Reports:

1. **Preview "Participant Diagnostic Report" for Cleola Arter and print the same report for Carline Clay.**

2. **Batch Print the Food Recall Reports:**

   - **"One Day Recall Summary" for Clients # 842*, 877, and *1042**
   - **"Food Recall Summary" for Clients of Paraprofessional Pat McKennon**

3. **Prepare for preview a "Diet Summary Report" for the Entire Unit using the filter of "Food Stamps." Preview graphs which show "Food Group Improvement."**

Mailing Labels:

1. **Create Mailing Labels for a specific, Graduates only who are Food Stamp Recipients. Preview the Labels.**

Keyboard Tips

The same segment on Keyboard Tips is provided at the end of the Daily Use--Adult and the Daily Use--Youth videotapes. The ERS manual, Volume 1, chapter 2 "Getting Started", also includes some keyboard and mouse tips. You can use the Help system within ERS to explore "Editing Keys", "Navigation Keys", and "Shorthand Keys for Data Entry" for more detail.

Help

While in the program, press the F1 key, then ALT-S or click on the Search tab. An ERS Help window with an Index tab and a Find tab is displayed and you are prompted to "Type the first few letters of the word you are looking for". As you type in what you want to search for (ex. Navigation keys) the list jumps to entries that start with the letters you have typed and you can usually pick the one you want with the mouse before you finish typing the whole entry. You can TAB to the next field, use the down arrow to find it and then Enter. Or you can double click on the entry you want with the mouse to display the information. You can print a copy for reference with File, Print.

The entry you are searching for may not be found if it doesn't match an indexed title, ex. Keys. Under Search, click on the Find tab (or CTRL-TAB from the Index tab). You will have to re-type the entry you want to find and press Enter. The first time you access Help for the day, it will ask you to minimize or maximize the search, minimize is usually enough. The Find looks in the contents of the indexed help titles and lists any titles that contain the entry you are searching for (default option finds your words in any order). Ex. Keys is included in 9 different topics, which are listed in the bottom pane. You can double click with the mouse to open a particular topic. Click on Search then Find to get back to your list of relevant topics and double click to view another one.

DAILY USE - OPTIONAL COMPONENTS TAPE

Optional Adult Sections:

For Users of Nutrition Method 1

Freezing Recalls:

Freezing Recalls prevents further changes to a recall. The meal items associated with the recall are deleted to free up disk space.

When the "Freeze Recalls" button is selected:

1. A list of adult participants in ID order is presented. The ID Locator or the Page Down can be used to scroll to the client you are seeking.

2. Clicking on the "explode" key, presents a Freeze Recalls screen which identifies all the recalls present for that client. Information presented includes the date of the recall, if the client is pregnant or nursing, if one of the recalls is an EXIT, number of meals, if the recall is already frozen and the option to "Freeze Now".

3. Clicking on the "explode" key, allows viewing the recall summary for that client.

4. One choice is to "cancel" the freeze process and go back to the "freeze recalls" screen or "save" and exit.
5. To freeze a recall, click with the mouse in the column, "freeze now." The recall will be frozen, when you exit the screen.

6. After freezing recalls, you will need to go under ERS Tools and Repair/compact the DataDB to reclaim the disk space.

7. The "Explode" button will still let you look at the recall summary, but no changes can be made.

Recommendation about “Freezing Recalls”: Recalls should never be frozen until after the client has graduated and the recall data verified.

Foods Database:

The Foods database contains the name, the nutrient values and food group servings for 1523 foods. Only Nutritional Method 1 uses the foods database. Foods are entered in standard amounts...items and measures. The Foods database is organized or indexed by food name. The food names for many types of foods are listed by category, such as bread, juices, cereal, beef, soup, sauces, etc.

The "Foods Database by ID" opens a listing of foods in the database in ID order. Information provided includes the grams/unit, the unit of measure/serving, and the food name. The "explode" button lets you view the food item for information on nutritive value, food group servings and the source of nutrition information. - The ID Locator lets you search for a particular food by ID number.

The "Foods Database by Name" gives a listing of foods in the database in alphabetical order. Information provided includes the ID number, grams/unit and the unit of measure/serving. The "explode" button lets you view the food item for information on nutritive value, food group servings and the source of the nutrition information. The “Locate Name” is used to search the database for a particular food by alphabetical listing.
The "Food Dictionary" is the place to print out this resource for people who are coding foods. The dictionary can be sorted in ID or name order. Name order is probably the easiest for people who are coding foods. The dictionary can be handed in one of three ways: sent to a "printer", "preview" or to a "RTF" file for use with wordprocessing.

Adding New Foods to Foods Database:

Adding New Foods to the “Food Database” should be done in consultation with your state office. Foods added at the “Unit” level will not export in the state report. Prior to being able to add new foods to the database, "System Administration" must be selected from the Main ERS Switchboard.

1. At the "system administration" switchboard, click on the "system configuration" button. This is the place to set the parameters of the data you are currently able to access and use. One of the selections is "Allows Updates of Foods Database".

2. Use the mouse to enable this option by putting an "x" in the box. You will now be able to add to the foods database. It is recommended that this switch be kept disabled except when changes are necessary. It will help avoid accidental and undocumented changes to the Foods database.

3. After enabling the "Allows Updates of Foods Database," use the "save" button to retain the change and to return to the "system administration" switchboard.

4. Use the "exit" door button to return to the main switchboard.

5. Select the "nutrition" switchboard and the "Foods by ID or Name" button. An "Add Food Items" button now appears on the browse screen.

6. Clicking on the button opens the "Add Food Item" screen which promotes you with a new food ID.

7. Clicking on the "next" button provides the "Edit Food Item" screen to enter the new values.

8. **After entering the values for the food item, select the "save" button to add the food to the database.**

9. **All foods entered in ERS will have the source code of "U"...Unit system(ERS).**

10. **After entering a food to the databases go back to the "system administration" switchboard and disable the "Allows Updates of Foods Database."**

Exercises: Foods Database

1. Under "Food by ID" locate item # 45 using the "Locate ID". The correct answer is: Beans, Kidney.

2. Check to see if correct Foods database is loaded...Control+End and the last food items should be 1540 if only federal foods or the last number for your state added foods.

3. Under "Food by Name" locate "Beans, Waxed" using the "Locate Name". Correct Food ID is 56.

4. Preview the "Food Dictionary" by ID and by Name Order.

Checklists Switchboard

The "Checklists" switchboard is used to access the functions of the Behavior Checklist component. Functions include:
- Entering "Checklists by ID, Name, and Staff",
- Printing Reports, and
- Accessing "Additional Questions". The ten base checklist questions are in the program when it is installed.

Behavior Checklists for individual clients can be added under any of the three "Checklist by..." buttons. "Behavior Checklist" responses can also be entered using the "jump" button on the "add adult" screen at the time a new client is entered into ERS. Behavior Checklist responses can only be added for existing clients under the Edit Adult on the "Adult Switchboard."

Preparing to Add a Survey:

1. After picking your preference of "Checklist by", locate the client using the locator box or by moving the cursor up and down.

2. Select the client by clicking on the "explode" button or by using the "enter" key.

3. The "checklist" browse screen gives:
   - a listing of existing checklists including the date the survey was recorded,
   - indication if it was an "exit" survey, and
   - if the answers were secured through an interview.

There are three possible actions under the browse screen...Add a Survey, Change a Survey Date, and Add Additional Questions.

Add Additional Questions:

Determining whether this client has responded to "Additional Questions" is the first decision in the steps to entering a survey. If the client has, the "Additional Questions" must be added by pressing the "Add Additional Questions" button. A browse screen reveals the additional question sets imported from the state. Select the set the client has answered, and click on the "save" button. This action returns to the "checklist" screen which now identifies the question set identified.

Add a Survey:

- To add a new survey, click on the "add survey" button which brings up the "new checklist" screen.
- The "Survey Date" prompts the "entry date" and can be edited to reflect the correct date.

- The "tab" or "enter" key will move the cursor through the items on the screen.
- To indicate "yes" for "exit survey" or "interview" you must use the mouse to click on the descriptor or press the space bar when the descriptor is highlighted.
- The default for all the questions is "not applicable" which is the answer to avoid.
- The response to each question may be entered by: keying the numeric code, or clicking on the checkbox in the appropriate column.
- If the client has responded to one of the additional question sets, click on the "Additional Questions" button to access the data entry screen for the additional items.

- When you have finished entering the responses, click on the "save" key to make the survey part of the client's record.
- If you click on the "cancel" key, it will give a warning about canceling this new survey.

- The "save" button returns to the browse screen for this client and adds the new checklist to the list of existing records.

Change Survey Date:

The "Change Survey Date" button is useful when it is noted that the wrong date is entered for the checklist. Most often the wrong year gets entered into the record.

Checklist Reports:

Behavior Checklist Diagnostic Report:

This function is used for volume printing of Behavior Checklist Diagnostic reports. This report uses the messages associated with the behavior checklist questions to give the participant feedback for his or her food behavior practices. There is the choice of output mode as print or preview. Preview is not available with the batch print.

Behavior Checklist Diagnostic Reports can be printed for an individual or for a group of clients (batch). When printing for an individual, you can select the diagnostic report you wish to print if there is more than one in the record. When using the batch print, the last record entered is the one that gets printed. When using one of the "batch print" options, you can use the mouse or the space bar to mark the individual boxes if you want to print specific records or "select all".

After making the selection of records to be printed, the "print selected reports" button will let you batch print the designated records. The computer will prompt you with the number of records to be printed. You will have to acknowledge that the number is correct before it will

proceed to print the reports. "Batch Print Changes" allows you to print all records which have been changed within a designed number of days.

Review Report:
This function is used to print the Checklist Review Report. The Checklist Review allows staff to review the results of the survey by comparing ENTRY and EXIT responses and "Improvement" for each participant. The "adult selection" can be for the "entire unit" or by a specific staff. The sort of adults can be by "ID" number or by "name." The question sort is by "Base Questions" and "Additional Questions."

After making the decision about who and what to include in the review report, click on the "next" key. The report lists every client and their numeric code for each question at Entry and Exit and the improvement/change for each question.

Behavior Checklist Summary Report:
The Behavior Checklist Summary report illustrates the survey results using tables and graphs. This report includes both base and additional questions. The Behavior Checklist Summary Report screen lets you select the adults to be included in the report. Options include the reporting year dates, subgroup filters, and whether it is for the entire unit, a single paraprofessional or by a zip code.

After making the selections desired, click on the "Next" button to proceed with a listing of clients or paraprofessionals. When doing the report for a particular (OPS), click on the print icon for that person. The switchboard will give you choices about previewing and/or printing the graphs and reports.

Key Points for the Checklists Switchboard:

1. **The “Jump” button on the “New Adult” screen is the most efficient place to add a new checklist for the client.**

2. **Decision about “Additional Questions” must be made prior to moving forward with entering a client’s survey.**

3. **The “Survey Date” prompts the “entry date.”**

4. **The default for all questions is “not applicable” and the answer to avoid.**

5. **Batch printing is available for volume printing of Behavior Checklist Diagnostic reports.**

6. **The Behavior Checklist Summary Report illustrates the survey results using tables and graphs.**

Exercise: Checklist (see Attachment 4)

1. **Add the ENTRY Behavior Survey for Sue Bread from the Adult Switchboard using the "Jump" button.**

2. Add the EXIT Behavior Survey for Sue Bread from the Checklist Switchboard.

3. Preview/Print the "Behavior Checklist Diagnostic Report" for Sue Bread.

4. Preview/Print the "Checklist Review Report" for Kim Collins, P00004.

5. Print the "Checklist Summary Report" for Kim Collins, P00004, with a filter of "Food Stamps".

Perinatal Switchboard

The Perinatal Component provides an assessment of the prenatal care received by pregnant females, birth outcomes and the breastfeeding practices of nursing females. For each client there are three choices of data to be collected: Prenatal Only, Breastfeeding Only, or Both Prenatal and Breastfeeding.

The perinatal projects record will be updated several time during the prenatal and breastfeeding period. Completion of the prenatal care information is indicated by the entry of the birth date. Completion of the breastfeeding portion is indicated by the entry of an "end record" date. The records have to be marked complete, before the information will be included in the Perinatal Projects Summary Reports. These two dates will determine in which reporting year the data will fall.

The Perinatal data can be entered though the Perinatal Switchboard or through the "jump" button in the "add Adult" screen under the Adult Switchboard. The "perinatal" screen has four data components..Prenatal Information, Delivery Information, Birth Information, and Breastfeeding Information.

There are three "Perinatal Data by..." buttons which all do the same thing.

Adding Perinatal Data:

1. Clicking on any of the "Perinatal Data by..." buttons leads to a browse screen with a list of adult clients or staff.

2. The "explode" button is used to select the records where perinatal data will be attached.

3. The Perinatal Data browse screen shows existing records and the data contained.

4. The "explode" button can be used to view and edit the current records. The four data components can be accessed here.

5. Each component has an "explode" button to reach the data entry screen.

6. The "print" button can be used to print the "Perinatal Projects - Profile Report" from this screen. The "print" icon prepares a Perinatal Projects - Profile Report for this client which includes information on all four areas of perinatal information.

Creating a New Record:

1. The "Create New Record" button is used to add the perinatal data.

2. The "Create Perinatal Information" screen will prompt for the type of perinatal information to be added. I would suggest selecting "Both" even if the mother has not made a commitment to breastfeed. If you select "prenatal" and she decides to breastfeed, you have to enter a whole new record. If you select "both" and she decides not to breastfeed, you can leave those fields blank.

3. The Prenatal Information screen requests information on Medical Care; CES Contacts for Prenatal Instruction; Teaching Location, Curriculum and Number of Lessons; Mother/Pregnancy Information; Mother's Knowledge and Use of smoking, alcohol and street drugs; and Mother's breastfeeding plans.

Required fields for inclusion in the Perinatal Summary are: Date of first and last CES contact; Curriculum and location of lessons; and Exit Code other than 0.

4. The Delivery Information screen requests information on the Place of Birth; Number of Births; and Days in the Medical Facility. None of the fields are required fields.

5. The Birth Information screen requests information on the baby including the name, Date of Birth; Birth Outcome; Sex; Birth weight; Days in the medical facility and Survived first month. A separate record is maintained for each baby. If the Birth Outcome is Premature, you will be prompted to enter the weeks of gestation completed. Date of Birth is a required field for the prenatal information to be included in the Perinatal Summary report.

6. The Breastfeeding Information screen requests information on the initiation/discontinuation of breastfeeding and when other foods were introduced. Breastfeeding initiated means the child was put to the breast at least once. Only records where breastfeeding was initiated will be included in the Perinatal Projects Summary report. If breastfeeding was initiated, the "Date breastfeeding was discontinued" and the "End Record Date" are required fields for the data to be included in the Breastfeeding Report. The End Record date is the indicator that all available information has been entered. The End Record date must fall within the period of the summary report.

Perinatal Reports:

Perinatal Projects - Profile Report:
The "Perinatal Projects - Profile Report" for individual clients can only be printed from the "print" icon under the "Perinatal Data" browse screen.

Perinatal Summary Report:
The function of the "Perinatal Summary Report" button is to prepare the Perinatal Projects Summary report. An option screen allow you to define: the report period, the subgroup filter, other selection criteria, such as staff and Zip code. The report is six pages with two parts...

- Part A has 12 items which summarizes the information in the Prenatal Information section of the record, and
- Part B summarizes the Birth Information in 9 items.

Perinatal Review Reports:
The Perinatal Review Report is used to review or validate the data entered. The report may be prepared for the entire unit or for a staff member. Separate reports are prepared for the prenatal and breastfeeding portions, and the breastfeeding report is in two parts. This report presents the data entered for each individual client in an easy format to find errors.

Key Points for Perinatal Switchboard:

1. **Perinatal data will be updated several times during the prenatal and breastfeeding period.**
2. **Prenatal Care Completion is indicated by the entry of the birth date.**
3. **Breastfeeding completion is indicated by the entry of an "end record" date**
4. **Required fields for Perinatal Summary of prenatal information are: Date of first and last CES contact; Curriculum and location of lessons; and Exit Code other than 0.**
5. **Required field for Perinatal Summary of birth outcome is: Date of Birth.**
6. **Required fields for the Breastfeeding Summary Report are: date of the initiation/discontinuation of breastfeeding; and date other foods were introduced.**

Exercise: Perinatal (see Attachment #)

1. **Preview the Perinatal Summary Report for Marie Agee, P00006.**
2. **Edit Catherine Atchy, Client # 3126, by adding Birth Information.**
3. **Delete the Perinatal Data for Ronald N. Whidden, Client #767.**
4. **Preview the Perinatal Summary Report for Marie Agee, P00006. Has it changed?**
5. **Create a Perinatal Record for Elsie Bluitt, Client #3074. (see Attachment #)**
6. **Preview the Perinatal Report for Elsie Bluitt, Client #3074.**

6. **Preview the Perinatal Summary Report for Marie Agee, P00006. Did it change?**
7. **Preview the Perinatal Review Reports. Delete any duplicate records.**

DAILY USE -YOUTH TAPE

YOUTH SWITCHBOARD

The Youth Switchboard maintains information on youth groups and the individual members of the groups. The youth switchboard also facilitates the printing of the youth reports. Youth groups may have INDIVIDUAL or GROUP enrollments. Regardless of the type of youth enrollment the group must be created first. The volunteer/staff leadership for the group must be entered under the Staff Switchboard before the groups can be created.

Youth Enrollment

Individual

Enrollment involves the entry of each youth in the group into the database. The system summarizes the demographic information about the individuals into the Youth Group database. Outputs not possible with the group enrollment include: mailing labels and group rosters.

Group

Enrollment collects the youth information in summary form. Only the summary information is entered into the Youth Group database. Group enrollment is used for groups of limited duration or when detailed data on participants are not available or are not needed.

Youth Group IDs and individually enrolled youth IDs are assigned from 1 to 99999 by the system.

Youth Groups by Group ID and Groups by Group Name:

The "Youth Group by Group ID" and "Groups by Group Name" buttons allow you to perform the same functions including adding/editing youth groups and adding/editing youth members, just organized differently.

1. Clicking on either of these buttons accesses the youth groups from a browse screen sorted by group ID or by name.

2. The browse screen provides information on the enrollment type, delivery mode, the ID number of the staff/leader working with the group and the name of the group. Up to four leaders can be identified for each group, but only the name of the #1 leader appears on the group listing.

3. Group names can be determined in several ways. The name of the leader or the meeting location are the most common ways but a creative name can be chosen by the participants.

4. The "Add Youth Group" button is used to add new groups. The system will prompt for "individual" or "group" enrollment and suggest an ID number for a new youth groups. NOTE: The person who is being assigned as the leader must already be in the "Staff" database. After making or accepting the choices, click on the "next" button to begin the addition of a youth group.

5. **Adding a new "individual" enrollment youth group: General information on the group is added on this screen. Required fields are: Delivery, Start and End dates; Leader #1's name. Every required field but Leader #1's name has a default which can be accepted.**
6. **Adding a new "group" enrollment youth group: General information on the group as well as all the required demographic information on the youth is needed. Required fields with no default include: Leader #1's name, age of youth, sex by race and place of residence for the youth.**

Edit Youth Groups:

The "explode" button leads to an "edit youth group" screen where detailed information on the group can be reviewed and edited. At the top of the edit screen, the type of enrollment ...individual or group is indicated. When making additions or changes on the "Edit Youth Group" screen for individual enrollment, you will be prompted to "View/Edit Youth in Group" before saving the changes. This "save" or "cancel" button does not impact the data entered on individual youth. Selecting the "view/edit youth in group" button displays current youth members which can be edited and/or deleted from the group. New youth can be added here by selecting the "add youth" button. The steps are the same as adding under the "Youth by...".

"Youth by ID, Youth by Name, and Youth by Group":

The "Youth by ID", "Youth by Name" and "Youth by Group" buttons only apply to youth who are individually enrolled. These three buttons allow access to youth records from a browse screen which allows: "adding youth", editing of youth through an "explode" button, and removing of youth using the "delete" button.

1. **It is probably easiest to "edit" and "add" youth through the "Youth by Group" button.**
2. **The "browse" screen provides a listing of all the youth groups with individual enrollment.**
3. **By clicking on the "explode" button, you can view/edit the current youth and use the "add youth" button to enter a new youth. By working from this menu, you are assured that the youth will be entered into the correct group.**
4. **After selecting the "Add Youth" button, the system will prompt with the name of the current group and the next available ID for a new youth.**
5. **If several youth are being added to different youth groups, the "Group" drop down screen will let you select the different groups.**
6. **If you are accepting the group and the youth ID number, click on the "next" button or press the "enter" key.**
7. **The required fields are Name, Sex, Race, Residence, and Birth date.**
8. **The "entry" date default is the day the group was created.**

9. The "exit" date will need to be completed before the end of the reporting period for the group to be included in the year's report.

10. After completing the "New Youth" fields, it will be necessary to use the mouse to click on the "save" button to add the youth to the database.

"ReTally Youth":

When changes are made to the youth records, the system automatically re-calculates the counts by sex, race, age, and residence for each group. The system also checks Group Enrolled groups to verify that the counts match. If error are encountered, the group ID is displayed. You should note the group(s) with the error and correct the problem. This function is run automatically when changes to the individual youth records are made. You may wish to run it at other times to make sure the counts are correct.

Youth Reports:

The "Reports" include eight different reports and mailing labels. Some of the reports and mailing labels are only available with "individual" youth group enrollment. All the reports allow the designation of a specific time period to be covered by the report.

Summary Reports can be generated as a "Group Profile" or a "Participant Profile".
The "group profile" is a two page report which combines the data from the group and individual enrollment to give a total picture of the youth program participation. The "participant profile" is a two page report which presents data for individually enrolled youth only.

Youth Delivery Mode Report is a one page report which summarizes the data on all youth participants by the seven delivery modes. It provides an overall picture of the number of youth groups, the number of meetings, the number of contact hours, and the number of participants for each delivery mode.

Youth or Group Roster is only available for groups who have individual enrollment. The roster can be created for a particular group or the entire unit, a specific period of time, and can be sorted by ID or Name of the youth. The selection of group comes from an ID listing of the youth groups. At that time you will select whether to print or preview a particular group or you can select to "Preview All" or "Print All". The "Print All" is a batch print type function to get group rosters for all the individual enrollment groups. If you select for the "Entire Unit", the product is a listing of all the individually enrolled youth in the unit. It does not give an indication of their group attachment.

Group Names by Leader Report provides a listing of the groups for which the paraprofessional or volunteer is a leader. The lists are divided for primary (leader #1) and support (#2,#3, and #4) leader roles. The selection can be by Leader ID or by Leader Name. Individual records can be previewed or printed and/or batch printing and preview are available through the "Print All" and "Preview All" buttons.

Group Leader Summary Report provides summary information about the groups where the selected staff member is a primary or support leader. The summary information includes:

number of youth, number of meetings, contact hours, and delivery mode. The leader selection can be done by ID or by Name. Since this report is most helpful as a management tool for hired staff and the staff or (OPS) IDs are first in the listing, using the listing by ID might be the most direct way to get to the desired staff. Once again there is the choice of previewing or printing an individual record or batch printing or previewing all the records.

Group Review by ID provides summary information about groups in ID order. The summary information includes: number of youth, number of meetings, contact hours, and delivery mode. This report is helpful in finding errors including skipped ID numbers and "begin" and "end" dates outside the reporting year.

Youth Group List provides a listing of the groups in either ID or Name order. The information included is name, address, phone number, and leaders ID numbers.

Group Detail Report is a one page report which gives a listing of the information contained in the group record. The report includes information: on the name of the group, information on the volunteer leader, number of meetings, contact hours, impact indicators, and demographic information on the group members. Once again there is the choice of previewing or printing an individual record or batch printing or previewing all the records.

Mailing Labels can be prepared for three different scenarios...

- **Youth in Group for individually enrolled youth,**
- **Group Addresses for mailing information to each group, and**
- **Group Leaders for sending information to all the youth leaders . . . primary and support.**

If mailing labels are something you want to be able to use, you must take the time to put in the addresses for youth and all leaders.

Key Points For Youth Switchboard:

1. **Leadership staff is entered under the Staff Switchboard before trying to attach to a youth group.**

2. **Youth group(s) must be created before entering "individual" youth enrollments.**

3. **When doing "group" youth enrollments, the required fields of age, sex, race, and place of residence have agreeing numbers.**

4. **When "adding new youth" the required fields are age, sex, race and place of residence.**

5. **To generate "group roster" and/or "mailing labels", youth must be entered individually into an individual enrollment youth group.**

6. **Default "entry date" for youth is the date that the youth group was created.**

7. **"Exit" date determines how the record will be handled in the end of year reports.**

8. **Editing individual enrollment youth groups does not impact the individual youth data.**

9. **"Youth by ID, Name, and Group" buttons only apply to individually enrolled youth.**

10. **Adding and editing individually enrolled youth through the "Youth by Group" button assures that will be entered into the correct group.**

11. **ReTally Youth is triggered automatically when changes are made in the youth records.**

12. **If the "ReTally" finds an error, the group ID is displayed so the problem can be corrected.**

13. **Group Review by ID report is helpful in finding errors including skipped ID numbers and "begin"/"end" dates outside the reporting year.**

Exercise: Youth (see Attachment #)

Adding Youth Groups -

1. **Enter two new groups: one individual (Anytime Foods), and one group (Busy Bees) enrollment. See Attachments #8 and #9.**

2. **Edit the group enrollment by:**
   - **changing the total enrollment to 12 youth...age, sex, race and place of residence are your choice.**
   - **entering the number of meetings as 6 and the number of contact hours as 12.**

3. **Edit the individual enrollment group by deleting Leader #2 and adding a new leader, Becky Brown.**

Entering Youth -

1. **Enter five youth members of your chose into the Anytime Foods group.**

2. **Add a new youth to the Rainbow 4-H PEP, Group ID - 62.**

ReTally Youth -

1. **After making the changes in youth, "Re-Tally" the Youth.**

Reports -

1. **Preview/Print the Youth Summary Reports for both Group and Individual Profiles.**

2. **Print/Preview a Youth Delivery Mode Report.**

3. **Print/Preview a Group Roster for the "Anytime Foods" group.**

4. **Print/Preview a Group Names by Leader Report for Cathy King.**

5. **Print/Preview a Group Leader Summary for Susan Taylor.**

6. **Print/Preview a Group Review by ID.**

7. **Print/Preview a Group List by Name.**

8. **Print/Preview a Group Detail Report for Group ID #20.**

9. **Preview mailing labels for Group Leaders by Zip.**

Edit A Youth Group:

1. **Edit the "Program End Date" for the Anytime Foods group to December 21, 1997.**

2. Print the Youth Summary Report for Group Profiles. Was there an impact? If yes, what was it?

Keyboard Tips

Keyboard Tips are provided at the end of the Daily Use--Adult and the Daily Use--Youth videotapes. The ERS manual, Volume 1, chapter 2 "Getting Started", also includes some keyboard and mouse tips. You can use the Help system within ERS to explore "Editing Keys", "Navigation Keys", and "Shorthand Keys for Data Entry" for more detail.

Help

While in the program, press the F1 key, then ALT-S or click on the Search tab. An ERS Help window with an Index tab and a Find tab is displayed and you are prompted to "Type the first few letters of the word you are looking for". As you type in what you want to search for (ex. Navigation keys) the list jumps to entries that start with the letters you have typed and you can usually pick the one you want with the mouse before you finish typing the whole entry. You can TAB to the next field, use the down arrow to find it and then Enter. Or you can double click on the entry you want with the mouse to display the information. You can print a copy for reference with File, Print.

The entry you are searching for may not be found if it doesn't match an indexed title, ex. Keys. Under Search, click on the Find tab (or CTRL-TAB from the Index tab). You will have to re-type the entry you want to find and press Enter. The first time you access Help for the day, it will ask you to minimize or maximize the search, minimize is usually enough. The Find looks in the contents of the indexed help titles and lists any titles that contain the entry you are searching for (default option finds your words in any order). Ex. Keys is included in 9 different topics, which are listed in the bottom pane. You can double click with the mouse to open a particular topic. Click on Search then Find to get back to your list of relevant topics and double click to view another one.

ATTACHMENT 1

Expanded Food and Nutrition Education Program
Adult Enrollment Form
Unshaded Areas Completed by Participant

Fill out for each client at ENTRY and again at EXIT. Keep in client file after it's reviewed by Agent and sent to Secretary for computer entry.

PA's Name: Mary Mary **Family ID:** ______ ✗ **ENTRY** ____ **EXIT**

1. Name: Betty (First) M. (MI) Betty (Last)
2. Address: 1234 W. Main St.
3. City: Anytown Zip: 12345
4. Phone: (123) 456-7890 5. Age 21

6. Sex: . . . . F M
7. Pregnant: . . . . Y N
8. Breastfeeding: . . . . . . Y N
Enrolled in EFNEP before? . . . . Y N
If yes, did you receive a Certificate of Completion . . . . . Y N

9. Race: (check (✔) the category you identify with)
- 1-00 ____White (non-Hispanic)
- 2-00 ✓ Black (non-Hispanic)
- 2-04 ____Haitian
- 3-00 ____Am Indian/Alaska Native
- 4-00 ____Hispanic
- 5-00 ____Asian or Pacific Islander

10. Place of Residence: (circle one)
1. Farm
2. Towns under 10,000 & rural non-farm
3. Towns & Cities 10,000 to 50,000
4. Suburbs of Cities over 50,000
5. Central Cities over 50,000

11. Total Household Income (last month) $ 250

12. Instruction (Lesson) Type: (circle)
1. Group
2. Individual
3. Both
4. Other

13. Total Number of Lessons:______

14. Children by Age (list first name of children through age 19):

	Age (Years)
1) Sara	2
2)	
3)	
4)	
5)	

15. Number of Other Adults in Household: (don't count participant): 1

16. ENTRY Date: 11/25/97

17. Subgroups: (circle all that apply, up to 8)
- A - EFNEP
- C - ES/WIC
- D - Team Nutrition
- M - Healthy Start
- N - WINS Curriculum
- R - Grants
- S - Sample

County Specified W______
X ______
Y ______
Z ______

18. Assistance program that the family participates in at ENTRY: (circle)

1.	WIC/CSFP	Y	N
2.	Food Stamps	Y	N
3.	FDPIR (Food Distribution Program on Indian Res.)	Y	N
4.	TEFAP Commodities	Y	N
5.	Head Start	Y	N
6.	Child Nutrition	Y	N
7.	TANF	Y	N
8.	Other ______ (Specify)		

Complete Exit information only when leaving EFNEP Program

ATTACHMENT 2

19. Exit Reason: (circle)
1. Educational Objective Met
2. Returned to School
3. Took Job
4. Family Concerns
5. Staff Vacancy
6. Moved
7. Lost Interest
8. Other ____________________ (Specify)

20. EXIT Date:____________________

21. Did your family receive assistance as the result of a referral or suggestion from EFNEP personnel? **Y** **N**
If yes, check (✔) all that apply:

1.____ WIC/CSFP
2.____ Food Stamps
3.____ FDPIR (Food Distribution Program on Indian Reservations)
4.____ TEFAP Commodities
5.____ Head Start
6.____ Child Nutrition
7.____ TANF
8.____ Other:____________________ (Specify)

Expanded Food and Nutrition Education Program
Adult Enrollment Form
Unshaded Areas Completed by Participant

Fill out for each client at ENTRY and again at EXIT. Keep in client file after it's reviewed by Agent and sent to Secretary for computer entry.

PA's Name: Reddick **Family ID:** 3211 ____**ENTRY** ✗ **EXIT**

1. Name: Sue Bread (First)(MI)(Last)

2. Address: 1234 W. Anywhere St.

3. City: Hometown Zip: 33333

4. Phone: (123) 456-7890 5. Age 25

6. Sex: . . . . F M

7. Pregnant: . . . . Y N

8. Breastfeeding: . . . . Y N

Enrolled in EFNEP before? . . . . Y N

If yes, did you receive a Certificate of Completion . . . . Y N

9. Race: (check (✔) the category you identify with)
1-00 ____White (non-Hispanic)
2-00 ✓ Black (non-Hispanic)
2-04 ____Haitian
3-00 ____Am Indian/Alaska Native
4-00 ____Hispanic
5-00 ____Asian or Pacific Islander

10. Place of Residence: (circle one)
1. Farm
2. Towns under 10,000 & rural non-farm
3. Towns & Cities 10,000 to 50,000
4. Suburbs of Cities over 50,000
5. Central Cities over 50,000

11. Total Household Income (last month) $ 400

12. Instruction (Lesson) Type: (circle)
1. Group
2. Individual
3. Both
4. Other

13. Total Number of Lessons: 10

14. Children by Age (list first name of children through age 19):

	Age (Years)
1) Mark	2
2) Peter	4
3)	
4)	
5)	

15. Number of Other Adults in Household: (don't count participant): 1

16. ENTRY Date: 2/13/97

17. Subgroups: (circle all that apply, up to 8)
A - EFNEP N - WINS Curriculum
C - ES/WIC R - Grants
D - Team Nutrition S - Sample
M - Healthy Start
County Specified W______
X ______
Y ______
Z ______

18. Assistance program that the family participates in at ENTRY: (circle) DO NOT WRITE IN GRAY AREAS

1. WIC/CSFP	Y N	5. Head Start	Y N
2. Food Stamps	Y N	6. Child Nutrition	Y N
3. FDPIR (Food Distribution Program on Indian Res.)	Y N	7. TANF	Y N
4. TEFAP Commodities	Y N	8. Other ______ (Specify)	

Complete Exit information only when leaving EFNEP Program

19. Exit Reason: (circle)
1. Educational Objective Met
2. Returned to School
3. Took Job
4. Family Concerns
5. Staff Vacancy
6. Moved
7. Lost Interest
8. Other ______ (Specify)

20. EXIT Date: 6 / 30 / 97

21. Did your family receive assistance as the result of a referral or suggestion from EFNEP personnel? Y N
If yes, check (✔) all that apply:

1._____ WIC/CSFP
2._✔_ Food Stamps
3._____ FDPIR (Food Distribution Program on Indian Reservation)
4._____ TEFAP Commodities
5._____ Head Start
6._____ Child Nutrition
7._____ TANF
8._____ Other:______ (Specify)

ATTACHMENT 3

24-HOUR FOOD RECALL

1. ID #:

2. Date Taken: 2 / 13 / 97

3. PA Name: Reddick

4. Participant's Name: Sue Bread

Please Check (✓) Yes or No

5. Pregnant _✓_ **Y**___**N** **6. Breast-Feeding** ___**Y** _✓_ **N**

7. Takes Nutritional Supplements ____ **Y** _✓_ **N**

If "Yes" List Type:

8. Money Spent on Food Last Month: $ 125

9. Check (✓) Which Food Record:_✓_ **ENTRY** ____ **EXIT**

☐ **Other: Number** ____

MEAL TYPE		MEAL TYPE	
Morning	= 1	Afternoon	= 4
MidMorning	= 2	Evening	= 5
Noon	= 3	Late Evening	= 6

SERVING ABBREVIATIONS
TBSP = tablespoon; tsp = teaspoon; oz = ounce; c = cup; lb = pound; sl = slice

10. What did participant eat and drink in the last 24 hours? (To be filled out by Paraprofessional or Participant)

11. To Be Coded By Paraprofessional Staff.

FOOD ITEMS AND DESCRIPTION (Lists all foods and beverages. List separately main ingredients in mixed dishes.)	AMOUNT EATEN	MEAL TYPE	Food ID Number	Amount Code
Cornflakes	1 cup	1	| |	| • |
Milk	1/2 cup	1	| |	| • |
Toast	1 Tbsp	1	| |	| • |

				DO NOT WRITE IN GRAY AREAS
Quarter Pounder	1	3	| |	| • |
French Fries	10 Fries	3	| |	| • |
Bacon	1 pc	5	| |	| • |
Pancakes	1 cup	5	| |	| • |
Eggs Scrambled	½ cup	5	| |	| • |
Donut Holes	4 glasses	6	| |	| • |
Water	2glasses	5	| |	| • |
Coffee	2 cups	1	| |	| • |
Margarine (Soft light)	1 tsp	1	| |	| • |
Blackberry Jam	1 Tbsp	1	| |	| • |
			| |	| • |

12. Number of Lessons Taught Since Last Record: Individual ________ Group ________ Other ________	13. Number of Servings By Food Group: Bread/Cereal _____ Fruit _______ Vegetables ______ Meat ______ Milk ______ Other ______

ATTACHMENT 4

24-HOUR FOOD RECALL

1. ID #: 1072	2. Date Taken: ____/____/____	3. PA Name:
4. Participant's Name: Charles Cuyler		Please Check (✓) Yes or No 5. Pregnant ____ Y ✗ N 6. Breast-Feeding ____ Y ✗ N
8. Money Spent on Food Last Month: $ 125		7. Takes Nutritional Supplements _____ Y _____ N If "Yes" List Type:
9. Check (✓) Which Food Record: _____ ENTRY ✗ EXIT ☐ Other: Number ____		

MEAL TYPE	MEAL TYPE	SERVING ABBREVIATIONS	
Morning = 1	Afternoon = 4	TBSP = tablespoon	c = cup
MidMorning = 2	Evening = 5	tsp = teaspoon	lb = pound
Noon = 3	Late Evening = 6	oz = ounce	sl = slice

10. What did participant eat and drink in the last 24 hours? (To be filled out by Paraprofessional or Participant)

11. To Be Coded By Paraprofessional Staff.

FOOD ITEMS AND DESCRIPTION (Lists all foods and beverages. List separately main ingredients in mixed dishes.)	AMOUNT EATEN	MEAL TYPE	Food ID Number	Amount Code
Cornflakes	1 cup		| |	| • |
Milk	½ cup		| |	| • |
Biscuit,	1		| |	| • |
Honey	1 Tbsp		| |	| • |
Chicken Salad Sandwich	1		| |	| • |
Tangerine	1		| |	| • |
Chicken Cordon Blue	1 pc		| |	| • |
Fetteticine	1 cup		| |	| • |
Broccoli and Carrots	½ cup		| |	| • |
Water	4glasses		| |	| • |
Cookies - Vanilla Cream	3		| |	| • |
Pretzels	½ cup		| |	| • |
			| |	| • |

12. Number of Lessons Taught Since Last Record: Individual ________ Group ________ Other ________	13. Number of Servings By Food Group: Bread/Cereal _____ Fruit ____ Vegetables ______ Meat ______ Milk ______ Other ______

ATTACHMENT 5

EFNEP CHECKLIST

PA: Reddick Date: 6/30/97

Name: Sue Bread	❑ Entry ❑ Exit ❑ Check if interview	ID #

This is a survey about ways you plan and fix foods for your family. As you read each question, think about the recent past. This is not a test. There are not any wrong answers. If you do not have children, just answer the questions for yourself.

For these questions, think about how you usually do things *Please put a check in the box that best answers each question.*	1 Do Not Do	2 Seldom	3 Some-times	4 Most of the time	5 Almost Always
(1) How often do you plan meals ahead of time?			✔		
(2) How often do you compare prices before you buy food?			✔		
(3) How often do you run out of food before the end of the month?			✔		
(4) How often do you shop with a grocery list?		✔			
(5) This question is about meat and dairy foods. How often do you let these foods sit out for more than two hours?			✔		
(6) How often do you thaw frozen foods at room temperature?			✔		
(7) When deciding what to feed your family, how often do you think about healthy food choices?		✔			
(8) How often have you prepared foods without adding salt?				✔	
(9) How often do you use the "Nutrition Facts" on the food label to make food choices?		✔			
(10) How often do your children eat something in the morning within 2 hours of waking up?			✔		

ATTACHMENT 6

EFNEP CHECKLIST

PA: Reddick Date: 6/30/97

Name: Sue Bread ❑ Entry ❑ Exit ❑ Check if interview	ID #

This is a survey about ways you plan and fix foods for your family. As you read each question, think about the recent past. This is not a test. There are not any wrong answers. If you do not have children, just answer the questions for yourself.

For these questions, think about how you usually do things Please put a check in the box that best answers each question.	1 Do Not Do	2 Seldom	3 Some-times	4 Most of the time	5 Almost Always
(1) How often do you plan meals ahead of time?				✓	
(2) How often do you compare prices before you buy food?				✓	
(3) How often do you run out of food before the end of the month?		✓			
(4) How often do you shop with a grocery list?					✓
(5) This question is about meat and dairy foods. How often do you let these foods sit out for more than two hours?		✓			
(6) How often do you thaw frozen foods at room temperature?		✓			
(7) When deciding what to feed your family, how often do you think about healthy food choices?				✓	
(8) How often have you prepared foods without adding salt?			✓		
(9) How often do you use the "Nutrition Facts" on the food label to make food choices?				✓	
(10) How often do your children eat something in the morning within 2 hours of waking up?				✓	

ATTACHMENT 7

Date:____________

Perinatal Record
(front)

Unit:___________ PP's ID:_______ PP's Name:______________________________

Participant's ID: 3074 Participant's Name: Elsie Bluitt

Check box(es) to show client's expected participation: ❐ Prenatal ❐ Breastfeeding

Prenatal, Delivery and Birth information must be completed to include in Prenatal report
Delivery, Birth and Breastfeeding information must be completed to include in Breastfeeding report

PRENATAL INFORMATION

1. How many months pregnant were you when you first received medical care? 2 months

2. What was the total number of medical visits you received during your pregnancy? 10 visits

3. When did you receive your first Cooperative Extension Service (CES) lesson? 07/ 03 / 96 (date)

4. How many months pregnant were you, when you received your first CES Lesson? 2 months

5. When did you receive your last CES lesson? 03 / 30 / 97 (date)

6. From which curriculum did your CES lessons come? (Circle one)
   a. Have A Healthy Baby
   b. Great Beginnings
   c. Eating Right During Pregnancy
   d. EXCEL
   e. TAMS
   f. Smart Choices: A Nutrition Education Program for Women, Infants & Children
   g. Taking Care of Two, Nutrition for Moms and Baby
   h. Eating for Two
   i. Eating Right Is Basic
   j. My Child, My Choices

7. Where did your CES lesson take place? (Circle one)
   a. Home
   b. Agency site
   c. Community Center
   d. School
   e. CES location
   f. Other

8. How many lessons did you receive from the WIC Nutritionist, and what was the average length of lessons?
   5 Lessons 5 minutes

9. How many lessons did you receive through CES, and what was the average length of lessons?
   10 Lessons 15 minutes

10. Exit Code: (Circle one)
    0. Not yet exited
    1. Graduated before delivery
    2. Terminated before delivery
    3. Active in program at time of delivery

11. During your pregnancy, did your health care provider indicate that your weight gain was: (circle one)
    A. Not enough
    B. Too much
    C. Weight about right
    D. Not discussed
    E. Mixed messages
    F. Don't know

12. How many births are expected from this pregnancy? 1 Birth(s)

13. What is your expected date of delivery? 02 / 01 / 97 (date)

14. On a scale from 1 to 5, with 1 being little knowledge of the subject matter, and 5 being sound knowledge, what is your knowledge on the negative effect of the following during pregnancy? (Circle one)

Smoking	1	2	3	4	5
Alcohol	1	2	3	4	5
Street drugs	1	2	3	4	5

15. On a scale from 1 to 5, with 1 being no use, and 5 being use often, how often have you used the following during your pregnancy? (Circle one)

Smoking	1	2	3	4	5
Alcohol	1	2	3	4	5
Street drugs	1	2	3	4	5

16. What are your plans for breastfeeding? (Circle one)
    A. Plan to
    B. Do not plan to
    C. Not sure

POSTNATAL (back)

DELIVERY INFORMATION

1.Where was the place of birth? (circle one)	2.How many days were you in the medical facility after giving birth?	3.What were the number of births for this pregnancy?
H- Hospital, clinic or birth center O- Other X- Do not know R- Home	2 Days	1 Birth(s)

BIRTH INFORMATION

1. Please provide the baby's name
   James
   (First) (Last)
2. Please provide baby's date of birth: 01 / 31 / 97 (Date)
3. What was the outcome of this birth? (circle one)
   M- Miscarriage S- Stillborn
   P- Premature F- Full term
4. What is the sex of the baby? M- male F- female
5. What was the weight of the baby at birth?
   5 lbs. 8 oz.
6. How many days was the baby in the medical facility after being born?
   2 Days
7. Did the baby survive the first month after birth?
   Y- Yes N- No D- Don't know

BREASTFEEDING INFORMATION

1. Was breastfeeding initiated after baby was born? (Circle one) Y- Yes N- No
2. How many months do you plan to breastfeed? 6 months
3. Do you have prior breastfeeding experience? (Circle one) Y- Yes N- No
4. Who will be your source of breastfeeding support? (Choose up to 3)
   - A. Family and/or friends
   - B. Doctor, Nurse or other health professional
   - C. EFNEP or Extension staff
   - D. WIC staff
   - E. Other ____
   - X. No support
5. When was breastfeeding discontinued? 03 / 19 / 97 Date
6. What was your reason for discontinuing breastfeeding? (Circle one)
   - A. Infant self-weaned
   - B. Sore nipples/physical discomfort
   - C. Breast infection or other illness
   - D. Inadequate milk supply
   - E. "Bad" milk
   - F. Returning to school and/or work
   - G. Too demanding
   - H. Embarrassment
   - I. Infant was sick or hospitalized
   - J. Mother didn't like doing it
   - K. Mother breastfed as long as she intended
   - L. Inability of mother and child to successfully connect
   - X. Other
7. When did you start your baby on formula? 03 / 10 / 97 Date
8. When was formula discontinued? ___/___/___ Date
9. When were the following foods introduced?
   Cereal: ___/___/___ Juice: ___/___/___
   Fruit: ___/___/___ Mixed foods: ___/___/___
   Meat: ___/___/___ Dairy (non-formula): ___/___/___
   Vegetables: ___/___/___ Sweets and Other: ___/___/___
10. When was your last CES contact? 03 / 30 / 97 Date
11. End record date: 03 / 30 / 97 Date

ATTACHMENT 8

4-H EFNEP Group Enrollment Form
Florida Cooperative Extension

On Computer:______

Please print in the UNSHADED areas only. Skip #15 - #19 if you plan to enter youth individually.

1. Group ID:______ 2. Unit/Group Name: Busy Bees

3. **Unit Delivery Mode** (circle one):
A - Organized club
B - Special interest, short-term program & day camp
C - Overnight camp (resident, primitive, or travel)
D - School enrichment program
E - Individual, mentoring or family learning
F - School-age child care
G - Instructional television or video

4. Street Address: 1234 Clover Drive
5. City: Anywhere 6. State: NS 7. Zip Code: 32695 - 6789

8. Area Code & Telephone: (123) 567-9330 9. Program Start Date: 10/31/97 10. Program End Date: 12/31/97

Staff ID's: 11. Leaders (First and Last Names):

a. ______ Vivian Volunteer (Volunteer) c. ______ ______
b. ______ Brooks (PA or Agent) d. ______ ______

12. Number of Meetings: ______

13. Number of Contact Hours: ______

14. Impact Indicators	Applies	Percent
Eat Variety:		
Knowledge:	✔	50%
Select Food:		
Practices:		

Skip #15 through #19 if you plan to enter youth individually.

15. Number of Youth in other 4-H programs:______
Note: ALL Totals (Race, Age, And Place of Residence) must be the same.

16. Grand Total: 10 (Total in items #17 to 20 must agree with group total in #16)

17. Number of youth by age:

AGE							
___	5	5	9	___	13	___	16
___	6	3	10	___	14	___	17
___	7	___	11	___	15	___	18
2	8	___	12				

Age Grand Total: 10

18. Females and males by racial/ethnic background:

	1-00 White	2-00 Black	2-04 Haitian	3-00 American Indian/Alaskan	4-00 Hispanic	5-00 Asian/Pacific Islander	Total
Females	2	2			2		6
Males	2	2					4
Total	4	4			2		10

Race Grand Total

19. Number of youth by place of residence:
_____ 1. Farm
10 2. Towns with population under 10,000 and rural non-farm
_____ 3. Towns and cities with population 10,000 - 49,999 and their suburbs
_____ 4. Suburbs of cities with population over 50,000
_____ 5. Central cities with population over 50,000
10 Place of Residence Grand Total

20. Name and phone number of person completing this form:

Name: Susy Smith Phone#:

ATTACHMENT 9

4-H EFNEP Group Enrollment Form
Florida Cooperative Extension

On Computer:________

Please print in the UNSHADED areas only. Skip #15 - #19 if you plan to enter youth individually.

1. Group ID:_______

2. Unit/Group Name: Anytime Foods

3. Unit Delivery Mode (circle one):
A - Organized club
B - Special interest, short-term program & day camp
C - Overnight camp (resident, primitive, or travel)
D - School enrichment program
E - Individual, mentoring or family learning
F - School-age child care
G - Instructional television or video

4. Street Address: 1234 Clover Drive

5. City: Hometown 6. State: NS 7. Zip Code: 12245-6789

8. Area Code & Telephone: (123) 456-7890 9. Program Start Date: 09/10/96 10. Program End Date: 02/02/97

Staff ID's: 11. Leaders (First and Last Names):

a. ________ Susy Smith (Volunteer) c. ________ ____________

b. ________ Cathy King (PA or Agent) d. ________ ____________

12. Number of Meetings: _____

13. Number of Contact Hours: _____

14. Impact Indicators

	Applies	Percent
Eat Variety:	_____	_____
Knowledge:	_____	_____
Select Food:	_____	_____
Practices:	_____	_____

Skip #15 through #19 if you plan to enter youth individually.

15. Number of Youth in other 4-H programs:______
Note: ALL Totals (Race, Age, And Place of Residence) must be the same.

16. Grand Total:_____ (Total in items #17 to 20 must agree with group total in #16)

17. Number of youth by age:

AGE	___ 5	___ 9	___ 13	___ 16
	___ 6	___ 10	___ 14	___ 17
	___ 7	___ 11	___ 15	___ 18
	___ 8	___ 12		

Age Grand Total: ______

18. Females and males by racial/ethnic background:

	1-00 White	2-00 Black	2-04 Haitian	3-00 American Indian/Alaskan	4-00 Hispanic	5-00 Asian/Pacific Islander	Total
Females	____	____	____	____	____	____	____
Males	____	____	____	____	____	____	
Total	____	____	____	____	____	____	

Race Grand Total

19. Number of youth by place of residence:
_____ 1. Farm
_____ 2. Towns with population under 10,000 and rural non-farm
____ 3. Towns and cities with population 10,000 - 49,999 and their suburbs
_____ 4. Suburbs of cities with population over 50,000
____ 5. Central cities with population over 50,000
Place of Residence Grand Total

20. Name and phone number of person completing this form:

Name: Susy Smith

Phone#: